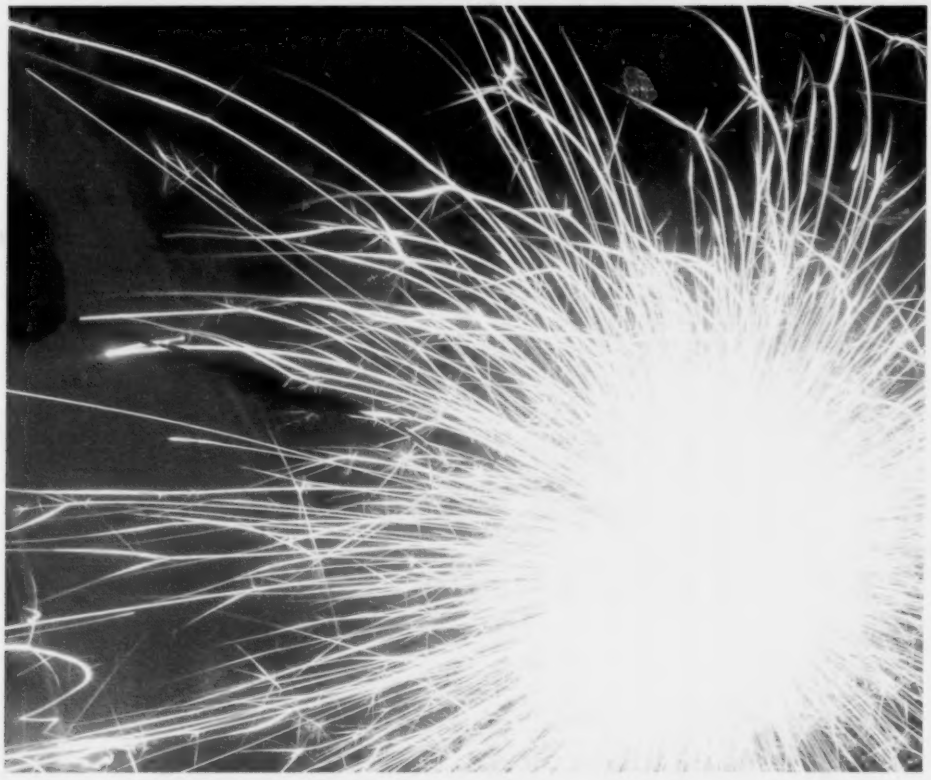

Public Input Toolkit

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Introduction

An essential balance between outcomes and trust must be maintained in municipal decision-making: building trust is just as important as achieving outcomes—both are necessary for success.

Relationships among people are a critical element of municipal business. This Toolkit provides some guidance about how municipalities can maintain good relationships through appropriate public input into decisions made by Council.

It is anticipated that the principal readers of this document will be:

a) those in municipal administration who are responsible for integrating public input opportunities into municipal projects and plans,
b) those on Council who will be making decisions about appropriate public input, and
c) those in municipal administration who will be determining if developers or other proponents have provided for an adequate public input process.

Section 1 of the Toolkit describes how public input opportunities should be planned and designed in small and mid-size municipalities. The information will help with decisions about:

- the amount of public input,
- the structure of the input process, and
- the integration between public input and the municipal decision-making process.

Section 2 describes approaches and techniques to help people who carry out public consultation activities on behalf of a municipality. The emphasis in this section is on delivery.

The *Municipal Government Act* (MGA, 2000) specifies minimum requirements for public notification and input. It also enables municipalities to do more to ensure public input informs municipal decisions. If a municipality were to limit its public input to the requirements of the MGA, that input could be received late in the decision process.

Section 3 expands on details provided in Section 1 and Section 2 to provide in-depth advice for municipalities considering the use of digital engagement tools and for municipalities that are already experimenting in this area.

Tip: While advertising public hearings and meetings through online and mobile media does not satisfy the requirements set out in the MGA, digital engagement can complement your normal approaches and help you reach a greater variety of residents.

The processes described in this Toolkit are supplemental to the legal requirements and are intended to provide more opportunity for public input, earlier in the process.

For convenience, many of the MGA sections that establish requirements for public input are described in the following table. However, this table is merely a "rough guide." *Check the MGA yourself to ensure you are fully informed.*

MGA Section	Summary of direction provided
197	Councils and Council committees **must conduct meetings in public,** unless section 2 or 2.1 applies.
227	If Council calls a **meeting with the public**, notice of it must be advertised and everyone is entitled to attend.
230	Describes when Council is required to hold a **public hearing** before second reading of the bylaw, or before Council votes on the resolution.
251 (3)	A borrowing bylaw must be **advertised.**
606	Describes the requirements for **public advertising.** Notice must be advertised at least once a week for two consecutive weeks or delivered to every residence in the area affected. Describes what a notice must contain.
636	Describes **notification and public input requirements** related to preparation of a statutory plan.
640 (2) (d)	Land use bylaw must provide for **how and to whom notice** of the issuance of a development permit is given.
692	Council must hold a **public hearing** (section 230) and **give notice** (section 606) before giving second reading to adopt or amend a land use bylaw or statutory plan, i.e. a. an intermunicipal development plan, b. a municipal development plan, c. an area structure plan, or d. an area redevelopment plan.

There are other sections of the MGA that describe public input requirements. For instance, if a municipality initiates an annexation proposal, then section 122 describes the notification and public hearing requirements. These sections are not described here because they do not directly affect the situations described in the Public Input Toolkit.

Section 1

Planning a Public Input Process

SECTION 1

Planning a Public Input Process

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SECTION 1

Planning a Public Input Process

1. Public input is part of the municipal decision-making process

If your municipality approaches decision-making with the assumption that communication and public input will improve decisions, your decision process will usually become more effective. Those who assume that public input is an "extra" demand often face more effort in the long run because affected citizens become more assertive in their effort to be heard. The municipality may find itself spending much more time resolving the issues that emerge.

Municipal councils make decisions in public for the public good. The process described in this section supports the involvement of citizens in these public decisions. Public input is sought by a municipality when there is a decision to be made. Public input during decisions is valuable to a municipality for three important reasons:

1. It leads to greater satisfaction and better relationships with citizens.
2. It reduces complaints and concerns that arise late in the process and cause expensive delays and responses.
3. It leads to better solutions.

Tip: A decision will not be effective if you fail to gain "desired outcomes" and "trust."

Elected officials play an important role in the process of gathering public input. They are the "empowering" agents who assure people their opinions and concerns matter. Many elected officials go out of their way to attend public meetings and hear public comments and discussion first-hand. Experienced citizens approach a councillor independently to ensure their questions and comments will be heard. In these cases, the councillor can help determine how to participate effectively, and can also ensure that important public questions are raised in Council.

2. When should public input be part of a decision?

Public input is essential to the municipal decision process. The *Municipal Government Act* (MGA) establishes a legal requirement for Council and Council committees to conduct business in public and to ensure the public is notified of certain kinds of decisions.

Much of the business of municipal councils is enhanced by public input. Nevertheless, there are decisions made by municipalities that normally do not include public input. **Directive** decisions are those made by a person authorized to do so, and are issued to others simply to inform them the decision has been made (see figure 1). Directive decisions are used in the following situations:

1. There is an urgent need to respond immediately (e.g. flood response).
2. A person in authority is acting within their authority (e.g. police carrying out their duties).
3. The decisions are routine and are accepted as part of the municipality's operations (e.g. snow removal after a heavy snowfall).
4. The decisions are dictated by law (e.g. improvements to water treatment plant).
5. The decisions have substantial effect only on those who have already agreed to be affected through some form of contract (e.g. employment, volunteerism, accepting elected office).

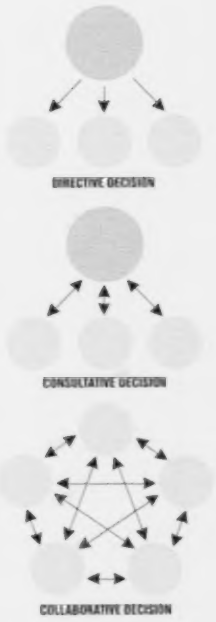


Figure 1: Types of decisions - the illustration above depicts the differences in making directive, consultative, and collaborative decisions.

In these cases, the municipality is acting within its authority and is expected to implement the decision efficiently. Some municipal staff broadcast directive decisions to the public using newspaper ads, mailouts, their website, newsletter, social media or text messaging, particularly in the case of public safety and transportation issues.

Public input processes become more important when the municipality is making decisions called **consultative** decisions. These have one or more of the following characteristics:

1. Public notification and input are required by law (see MGA requirements in the Introduction).
2. The decision is a known concern of other parties, or is likely to have a significant impact on other parties (e.g. a proposed casino).
3. The decision affects society's moral or emotional expectations (e.g. expansion of a recreation centre).
4. The decision affects the "comfort envelope" (lifestyle or habits) of citizens (e.g. road closure affecting how people access the highway).
5. People perceive there are risks associated with the decision (e.g. approving a "half-way" house to support convict rehabilitation).
6. Council or administration requests public input prior to making the decision (e.g. public buildings or open space management).

Consultative decisions are common in municipalities and are the type of decision primarily addressed in this section. However, the final decision rests with Council. Consultative decisions often involve moral or emotional elements, and are primarily face-to-face. However, digital tools can be used to notify residents about a face-to-face event during the consultative process, ask for feedback on an event, or perform a discrete task related to a larger consultative decision-making process (such as filling out a survey).

There are also **collaborative** decisions (or projects) in which the municipal representatives act in partnership with communities, organizations or individuals to deliver services or to respond to long-term challenges. In these collaborative situations, the municipality agrees to share the decision process with those at the table. Usually, those at the table must consult with their constituencies as part of the process. Collaborative processes are becoming more common because they can create greater "buy-in" and even "co-investment" (i.e. partners) from those at the table. Collaborative processes have been used in subdivision planning, business revitalization zones, recreational facility development and inter-municipal agreements. Traditional tools used in collaborative processes may include advisory committees, open houses, surveys, etc.

MAYBE WE SHOULD ASK THE COMMITTEE FOR A RECOMMENDATION.

As we will examine in Section 3, digital engagement tools can supplement face-to-face meetings or help when stakeholders find it difficult to meet in person. Digital tools that can augment collaborative decisions, processes and discussion groups include collaborative-writing websites (like wikis), and online charrette software.

When a municipality embarks on a collaborative decision process, Council must recognize that parties who share in the investment expect to share in the decision. There must be assurances these partners will be heard and their wishes respected. However, Council must still approve all recommendations prior to implementation.

3. How much effort should be put into gathering public input?

The MGA defines the minimum legal requirement for a municipality to provide public notification and opportunities for input. However, as elected representatives of citizens, councillors have a further obligation to be aware of citizen expectations and concerns before making their decisions. Municipal administrators are usually aware of the value of public input.

Gathering public input requires a commitment of time and in some situations, the process can be costly. In this Toolkit, you will find a tool (Resource 1) and advice to help you make decisions about designing appropriate public input processes, within your budget.

Most municipalities ask developers to consult with the communities affected by their proposed development. Two desirable outcomes should result from this effort:

1. Good relations between the developer and the affected communities, and
2. Better information for Council (or the committee) to consider when the application is brought forward for a decision.

A guide for developers is included as a handout at the end of this Toolkit. It can be given to interested developers to support them in their public input efforts.

It is difficult to predict the perspectives of those who may be affected by a decision. Unconsciously, we make assumptions that would quickly change if we were talking to someone with a different perspective on the issue. We recommend the following QuickTest as a way to ensure you are making good decisions about public input requirements. This interview guide can be used by either councillors or administrators.

QuickTest

Select five people who could be affected by the decision being considered, and who are likely to have a different perspective than your own. Contact them (in person or by telephone) and tell them you are thinking about how to approach public input-gathering. Let them know the situation and the decision being contemplated and ask for their thoughts:

- **Do they feel well informed about this matter?**
- **Are they personally interested?**
- **Do they think consultation is important in this situation?**
- **What would be a convenient and effective public input opportunity? Could this opportunity be enhanced with digital engagement?**
- **What do they think people will want to talk about?**
- **Who should be contacted for input?**

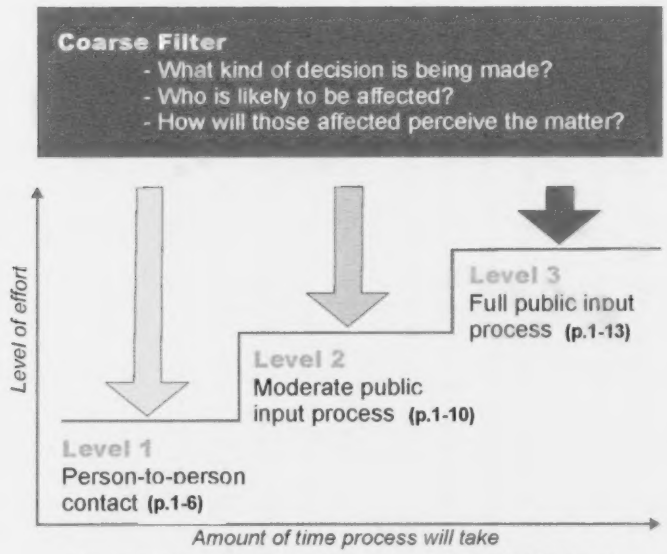

Coarse Filter
- What kind of decision is being made?
- Who is likely to be affected?
- How will those affected perceive the matter?
Level of effort
Level 3
Full public input process (p.1-13)
Level 2
Moderate public input process (p.1-10)
Level 1
Person-to-person contact (p.1-6)
Amount of time process will take

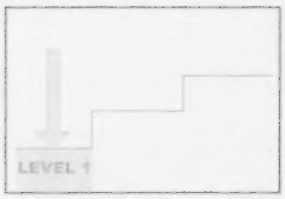
Figure 2: Initial screen to determine level of public input.

The screening approach illustrated in Figure 2 can be used early in the decision process to determine an appropriate approach to decision-making and to public input. This approach is based on the theory that **early detection of concerns often reduces the time and effort required to achieve a solution.** There are many examples of situations where public input not only avoided opposition and complaints; it also produced a better solution to the problem than was originally proposed.

However, in some situations, municipalities are legally required to provide for public input, and in such situations the legal requirements **must** at least be met. This Toolkit describes three levels of public input processes that can be used. The intention is to provide you with models you can compare. You are encouraged to "custom design" variations on any of these three processes.

To help you assess the level of public input for your project, see:

Resource 1: How much public input is appropriate?



Level 1: Person-to-person contact

The foundation for good public input processes in your municipality is maintaining good relationships with citizens and communities involved in municipal decisions.

Municipalities benefit from developing a "client service" attitude that helps build trust and satisfaction from every individual encounter with a client. While many factors can affect this relationship, the following are key requirements for success at the front counter or over the telephone:

- Client is greeted on arrival.
- Client never waits more than 3-5 minutes without an acknowledgement.
- Response process is efficient for the client (i.e. remove need to re-dial; remove need to find additional paperwork or go to several people for an answer).
- Person serving client is genuinely interested and friendly.
- Person serving client does not defend or deny (seeking clarification is OK).
- Person serving client ensures client's needs have been met before conversation ends.

Tip: The sooner people are informed of a change, the less likely they are to feel in conflict with the municipality.

A positive relationship can be achieved by modifying standard processes to ensure people are informed in advance of changes or to make sure individual concerns are heard and addressed. Given that the municipality has maintained good client relations, a great deal of public input can be addressed at the "person-to-person" level.

"Person-to-person" contact extends online, too. Keep in mind that a municipal website, email newsletter, text message service, and/or social media presence can be useful tools to help maintain good relationships with citizens and communities on a regular basis.

My level of trust is a result of how you behaved in the past.

Examples of level 1 public input are described on the following page. They all rely on early advance notice and personal effort to contact those affected. Assume it is **your job** to reach out to citizens who are likely to be affected by municipal decisions.

Situation	Suggested response
Developers express concern that they need to know of any changes to fees or application processes as soon as possible	• Hold an annual meeting with developers to inform them of any changes expected in the next year • Identify a person whom developers can call anytime to get updated information • Create an email list for interested parties • Explain the development application and approvals process on your website. Link application documents and list the fee schedules. Note on the webpage when they were last updated
Several large trees have to be removed from the boulevard *(Note: emotions could make this a Level 2 process)*	• Provide advance notice of the tree removal to citizens who are in visual range. Provide further information on the process on your webpage, and include the link in any mailers, flyers, or posters. • Personal contact with affected citizens is recommended, where possible • Staff should be prepared to spend time talking to neighbours and to explain why removal is necessary (and best) at this time • Identify and brief any bloggers or online groups who care about this area
Snow is removed after a heavy snowfall	• Send out public service announcements on local radio or in the press • Send email and social media alerts out, use social media to post updates
Recreation centre will no longer be open at 6:00 a.m. on weekdays	• Most municipalities will post an advance notice (more than a month) of the change • Post a new and different notice within a week of the change • Staff should personally explain the change to those using the facility during the affected hours • Update the parks and recreation website and/or Facebook Page with the advance notice and changed times. Don't forget to include your designated staff contact person's name on your website!

If you decide to use digital tools to supplement your level 1 consultation, you may use a website, an e-newsletter, Twitter, text messaging, Facebook, and/or YouTube. The following table outlines some tips for using these tools:

Tip: If you encounter confusing digital engagement terms in this toolkit, please refer to the glossary at the end of section 3 for guidance.

Digital Tool	Tips
Website	• Ensure site is accessible for everyone, limiting the use of technologies that are not accessible to people who use screen readers or older computers • Index your website on major search engines, like Google, so your residents can easily find it (do this manually with the search engine's webmaster tools or cultivate inbound links to your website) • Choose website software (content management software) that staff can easily update so your content stays up-to-date • Offer users the option to subscribe to website updates RSS, a format for delivering regularly changing web content • Provide email addresses and/or a comment box to allow residents to provide feedback
E-Newsletter	• Email is still the best way to get your message to most people • Consider offering an email newsletter that summarizes updates from your website and social media sites
Twitter, Text Messaging, RSS	• Use for important live updates, such as service outages or emergency communication • Guide people to your website for more information
Facebook, Twitter	• Use for customer service requests and program updates with your residents. See the Case Study on 1-9 for an example
YouTube, Flickr	• Host photos and videos on media-sharing sites like Flickr and YouTube and link or embed videos and images into your website. Not only does this save room on your web server, but it also makes it easier for your residents to find your content!

Budget:

Typically, a level 1 consultation is accommodated through adjusting approaches that would normally be part of the decision process anyway. However, level 1 consultation can require extra staff hours and communication efforts.

Case Study: Parkland County *"Social" Media Relations*

"The media are always looking for a story," says Jackie Ostashek, Communications Coordinator with Parkland County. Getting their attention can be a struggle so the County decided to connect through Twitter, a micro-blogging site designed to let people post short, 140-character text updates or "tweets" to a network of others.

Twitter is a constantly updated timeline where people take turns creating and producing content. "We knew we had some interesting stuff to share but sending out a press release to the media wasn't getting a great response so we needed to look at something different," says Ostashek. The media offer a way to expand the County's target audience. "We wanted to build a relationship with them to help us get the word out about the many different things we are doing in our community," says Ostashek.

After initiating their Twitter account, Parkland County searched for local and regional media organizations and personalities to follow. This search helped to reveal many contacts and the hashtag #yeg representing Edmonton. Hashtags are key words preceded by the # sign allowing people to direct tweets to interested followers. "The media outlets and personalities in Edmonton use this hashtag regularly to find out what is happening in the Capital region," says Ostashek. "Once we were using the hashtag we started to get noticed more. But the real results came when we started re-tweeting some of the posts of the Edmonton media. Then they started re-tweeting our stuff," says Ostashek.

The Twitter network is centered on the exchange of information. Building an audience requires not just posting but also re-tweeting. "We learned quickly that re-tweeting exposed us to a larger group and this helped build our network. Not only that but we started to build a relationship with the media. We have received comments from them thanking us for sharing their stuff and in return they have been great responding and replying to our posts. For example, with the recent wildfires in the region we were able to share images and updates with the media and they used the pictures we posted in their stories. This gave us a way of sharing information with a much wider audience in a shorter period of time," says Ostashek.

The type of digital media one chooses should consider the interaction it needs to support. Parkland County uses Twitter's capacity to exchange quick snippets of information to get the word out faster and to a larger audience than was possible before. A key learning for the County was that posting isn't enough. As a social network tool Twitter requires a personal touch with friendly interaction to build relationships in order to maximize effectiveness.

Jackie Ostashek can be reached at: jostashek@parklandcounty.com

Level 2: Moderate public input process

There are a wide variety of situations where a level 1 approach will be inadequate, but a level 3 process would be "overkill." Level 2 processes work best where the issue and the stakeholders are readily defined (i.e. specific area, specific stakeholders affected). Resource 1 illustrates that any two of the following would make a level 2 approach necessary:

- previous concern from the community;
- emotional concern;
- factors such as direct impact on fees or rates; or
- concern over aesthetics.

Health and safety issues, or a concern by many "secondary audiences" will make a level 3 process necessary. Some examples:

Situation	Why level 2 is often appropriate
Installing a youth recreational facility (when zoning allows this use)	▪ Affects more than a few citizens, and raises some concerns about costs, aesthetics and nuisance factors
Replacement of existing utility line or relocation of access	▪ Affects more than a few citizens, and raises some concerns about costs, aesthetics and nuisance factors, primarily during construction period
Altering application requirements for business licences	▪ Affects business owners only ▪ Not likely a "serious" issue ▪ Does not affect land use or taxes

Tip: Good public engagement, online or offline, is about mutual benefit. When reaching out to target participants, be clear about what is in it for them. Focus on what they personally will gain from being involved as well as your own goals.

The municipality is in the best position to determine an appropriate investment for a level 2 public input process. Many level 2 projects are proposed by a private company and the municipality may request the developer to undertake consultation to help fulfill consultation requirements. A level 2 process will generally require the following to be successful:

1. A municipal representative with specific responsibility for consulting with the affected public, with adequate communications support (i.e. a consultation coordinator).
2. Clear identification of the decision being made and a schedule that shows opportunities for public input. Clarify what is "on the table" for discussion and what is not "on the table." Establishing this boundary early helps everyone use their time well.
3. Early personal contact with some of the citizens who may be affected to determine the level of interest and concern (see QuickTest, p.1-4).
4. Identification and notification of the citizens (households, businesses) that may be affected.

5. One or more meetings to allow interested parties to become better informed and to raise questions or concerns (see meeting types, starting on p.1-22).
6. A responsive process that answers inquiries quickly and fosters two-way communication.
7. A direct linkage between the different groups (i.e. engineers, project planners, designers, etc.) who are working on the project.
8. A record of all contacts made, and all responses given to enquiries (this can be invaluable later when people fail to remember they were notified or are not satisfied with the proposed mitigation).
9. A willingness to try to address concerns through adjustments to the project timing, location, size or methods.

A number of digital and non-digital tools exist to solicit ideas, views and recommendations for a level 2 consultation. The choice of using these will often come down to:

- how much time you have for public engagement;
- what level of effort your staff is able to give; and,
- the abilities, preferences, and internet access of your audience.

Non digital tools include print newsletters, newspaper ads, open houses, coffee table discussions, etc. Digital engagement for a level 2 process includes the use of a website, e-newsletter, etc. The following table outlines some tips for using these tools:

Tip: Organize your contacts in a spreadsheet to make your life easier! You can record the usual information such as name, organization, email address, etc. Don't forget to track the projects you've told your contacts about, events they've attended, and what commitments they've made to let others know about the project.

Digital Tool	Tips
Website	• Host important documents, project descriptions, and frequently asked questions with answers on an easy to find page on your website • Announce public input opportunities and events • Describe the timeline and process for this public input process • Post contact information for the public to find out more about the project
E-Newsletter	• Update residents and stakeholders by email with pertinent information about the project or on opportunities to give input • Collecting and storing email addresses in an organized way is important for this to be effective • Recipients can forward your email, expanding the reach of your message. But, don't let email be your only digital engagement tool, since ignoring emails is as easy as forwarding them. • Consider using an e-newsletter service. These services automatically let community members subscribe and un-subscribe, which saves your staff time
Facebook, Twitter	• Use for project updates or as a method of public input

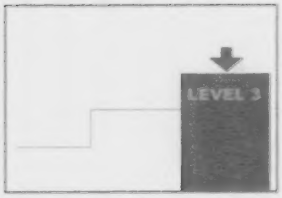
Digital Tool	Tips
YouTube, Flickr	• Help residents understand the issue with audio visual communication. You can open up comments on these sites to ask for feedback on an issue. Could be turned into a contest as part of your public input process

Budget:

The range of scale described by level 2 is fairly broad, and budgets will naturally vary with scale. The most costly items at this level of consultation are the staff time and the cost of communication support (e.g. displays for open house meetings, project-specific webpages or websites, online surveys, etc.). Typically, this level of consultation will require a support budget between $1,500 and $15,000.

Resource 2: Budget considerations for public engagement (worksheet)

Level 3: Full public input process



For some situations, a full commitment to public input is essential to success. These situations require good process, a committed municipal team, a consultation plan and a budget. Resource 1 will quickly identify the kinds of decisions most likely to require this level of commitment. Some examples:

Situation	Why level 3 is likely required
New municipal centre to house Council and municipal offices	• Concern about taxpayer expenditures and taxes in general • High profile building that may be seen to favour politicians at expense of electors
Significant industrial plant development or expansion	• Fear of effects on health, safety and environment • Potential linkage to property values
Change in transportation affecting established neighbourhoods	• Direct impact on lifestyle and habits • Potential property value impact • Concern about fairness
Public facility closure (or development)	• Direct impact on lifestyle and habits • Potential property value impact • Concern about fairness
Higher density housing, or low income housing, adjacent to established neighbourhood	• Potential property value impact • Concern about aesthetics, safety and lifestyle impact
Landfill location	• Potential impacts on property values, health, safety and aesthetics • Perception that location decision makes nearby residents disadvantaged while others benefit
Creation of a new Municipal Development Plan or Area Structure Plan	• Potential impacts on property values, health, safety and aesthetics

If you are considering a full public input process, it is helpful to know whether your objective is to:

- Solicit ideas, views and recommendations; or,
- Support and facilitate dialogue, deliberation, and other forms of collaboration.

In most cases, level 3 precedes a Council decision (i.e. the matter has not yet received first reading). The level of decision-making power you give to your stakeholders differs in each case. As a result, your stakeholders will appreciate knowing what the scope of input and potential change is.

Planning for a successful level 3 public input process is described in part 4 of this section of the Toolkit.

Budget:

Level 3 is resource-intensive. While much of the staff time (evenings, etc.) in municipalities may be accommodated through time-in-lieu, the costs must still be considered as "above and beyond" other operations. Generally, level 3 processes will cost between $10,000 and $50,000 if a record of time and expenses is maintained.

Resource 2: Budget considerations for public engagement (worksheet)

Case Study: Okotoks *Covering the Bases*

The Town of Okotoks is facing a critical decision regarding water and growth. There are significant pressures to grow both in and around Okotoks' borders; however, the community only has adequate water to support the anticipated population growth for the next two years. The rate and degree of growth is a topic for many Alberta municipalities but add in the matter of limited water supply and you have a subject that impacts the future of an entire community. With such a complicated issue, how does a municipality determine which engagement techniques to use?

"The more controversial the issue the more tools we will use. We consider who the target audience is because not every topic impacts every resident or business. We also think about what tools will offer us the best reach to the most diverse representation of our population, and how quickly we need to get the word out or seek input," says Nancy Weigel, Communication and Human Resources Manager for the Town of Okotoks.

The complicated issue of limited water supply and growth requires more input and collaboration than an online survey can offer. The effort requires multiple levels of engagement including the need to inform, share ideas, solicit input, and support and facilitate dialogue. "We use digital media to augment our efforts. For example, we planned a number of symposiums where water and growth experts were invited to present their knowledge and perspectives. These in-person sessions were supplemented by the Town's website where the presentations were posted and the community could provide their input and ideas," says Weigel.

Digital media offers the opportunity to exchange information in a timely manner, help people stay informed, share knowledge, and provide opportunities to learn. "In the case of controversial issues people have strong opinions and they need a chance to talk," says Weigel. Complicated issues framed by uncertainty require richer interactions that are best served through face-to-face meetings. This technique helps address the personal nature of the issue and provides immediate feedback. "The bigger the issue the more avenues we need to offer. So we will do face-to-face and online to cover all the bases," says Weigel.

Thinking about what decision needs to be made, the level of controversy, who will be impacted, and the time available for soliciting input are some key considerations that have aided Okotoks success when it comes to selecting appropriate engagement techniques. "Some tools are better than others and there is no one tool for everything. We have learned that the more options you offer the more you get back," says Weigel.

Nancy Weigel can be reached at: nweigel@okotoks.ca

4. How to plan a level 3 full public input process

A level 3 public input process requires thoughtful planning. The following text describes four process stages that will assist you:

- Stage 1: Preparation (p. 1-15)
- Stage 2: Information Exchange (p. 1-19)
- Stage 3: Comparison of Options (p. 1-20)
- Stage 4: Implementing the Decision (p. 1-25)

Stage 1: Preparation

Purpose: To establish the requirements for success.

To do list:

1. **Establish terms of reference for the process.**

   The terms of reference should clarify the scope of the consultation and the human resources and budget needed. At this stage, it may be helpful to draft digital engagement policies and procedures, if appropriate. Describe (and gain approval for) the budget as early as possible.

   At their simplest, terms of reference can be on one page and can simply identify the following:

   a. What is the objective of the project?
   b. What is the direction from Council?
   c. What level of public input is required?
   d. What is the timeline?
   e. What product does Council expect?
   f. Who is responsible?
   g. What are the budget limitations?
   h. Is it appropriate to use digital engagement tools? Do we have the capacity to use these tools?

   To develop a more comprehensive terms of reference, see:

   Resource 3: Developing the terms of reference (worksheet), and
   Resource 4: Sample terms of reference

   To fully understand the potential use of digital engagement tools as a supplement for your project, see Section 3, and:

   Resource 9: Evaluating capacity for digital engagement, and
   Resource 11: Choosing digital engagement tools

2. **Research and assemble information necessary to support an informed discussion.**

   At this stage, you may supplement regular research methods with listening online to interest groups related to your consultation process. What are people saying? Are they talking on Twitter, Facebook, or somewhere else?

3. **Identify who can act as reference persons (i.e. experts) during discussions.**

   Assigning roles and responsibilities is important at this stage.

4. **Develop a responsive internal communication and decision procedure.**

   Keeping people informed internally and coordinating processes will take as much, or more, time than the external consultation process. Be clear about scope (what is not "on the table").

5. **Select and train the consultation team (or hire appropriate contractors).**

   During the "peak" of the process, it is essential to have a team of people who can commit the necessary time to the process and who share a commitment to providing an excellent "service" environment. Public consultation requires a project manager and a project team—just like planning or development projects do.

   You may decide to engage several different staff groups in the municipality, including policy, technical, and communications functions to ensure that your public engagement connects to project goals, is sufficiently resourced, and remains in line with broader communications efforts.

6. **Define your audience and draft an initial map of stakeholders.**

Once you know who your target audience and stakeholders are, you can figure out how they like to communicate. Are they busy, or are they able to meet for long periods of time? Do they prefer to communicate online or in person? See "Defining Communities" on page 1-18 for assistance on defining audiences and stakeholders.

To learn more about your target audience, you can listen online to see where your audience spends time online and what issues they care about.

7. **"Sketch" the consultation process as you imagine it.**

   While the consultation process will definitely change, an initial sketch is invaluable to support project management. As you start identifying when public input will occur, you can decide which tools to use in your engagement and whether to use those in person and/or digital tools for the life of the consultation project, for specific events, or both.

Resource 5: Public input sketch (worksheet)

8. **Make tentative bookings for potential meeting locations.**

   If meetings will be part of the consultation process, check room availability and amenities as early as possible. It can be frustrating when you cannot find an available facility appropriate for your meeting(s). Keep in mind that you may need a room with a projector, computer, and/or internet access.

9. **Set up your online presence.**

   Claim your Facebook, Twitter, YouTube, Flickr accounts and/or your website address (domain name). While they take only a few minutes to set up online, be prepared to work with Council, senior staff, IT, communications, or another body to establish the accounts. Consider your long and short term goals when deciding if your online presence should be consistent under your municipality's name, regardless of the project, or if project-specific sites are appropriate (see Section 3 for further background on the use of social media tools).

10. **Refer to legislative requirements for notification. Determine how people will be notified.**

    Refer to the MGA.

11. **Create draft information materials to support the discussion.**

    Thinking about the information materials will help organize your ideas about communication, in general. Consider the use of videos or images to help communicate your ideas.

Defining communities:

There is no singular "public" out there whose wants and needs are simply waiting to be discovered. It is more realistic to imagine many "communities of interest" that must be contacted and consulted. One of the first tasks in the process of consultation is identifying the "stakeholder communities" or the "communities of interest." Used in this way, the term "community" simply means a group of people who share something in common.

Examples of a "stakeholder community" include the following:

- People who live in the same part of the municipality (e.g. downtown residents, rural subdivision residents, lakeside farmers).
- People who share work or lifestyle perspectives (e.g. the agriculture community, the arts community, the business community).
- People who share culture, beliefs or principles (e.g. an environmental community, a senior citizens' community, a religious community).

In some cases, the "community" is defined by its response to the decision you are proposing to make. For example:

- The "community" of those who oppose public funding for libraries.
- The "community" of those supporting protection of Elk Ridge.

In most cases, when attempting to exchange information between the municipality and any given community, consider the following:

- Are there leaders, organizations or representatives who speak for this community? If yes, do they consult with the community before they speak? Are they already active online? If so, where?
- Are there people who have a lot of influence over this community? Consider Chambers of Commerce, local boards/societies, ratepayers and other sports networks. Online, these influencers may be popular bloggers, people who write columns for online newspapers, or people with many followers on Twitter.
- What is the best way to provide information to the members of this community? In person? Online? Brief and high-level conversations? Deep and detailed discussions?
- What constraints might limit the opportunity for members of this community to provide their input?
- Do we know anything of this community's perceptions about the options we are considering? If yes, what do we know? If no, can we find out more before we proceed further?

Tip: Finding out who has influence over the community can help you spread your message to more people.

To find out major influencers online, you can use Technorati to search for blogs and WeFollow.com or Twitter Grader to find popular people on Twitter.

Stage 2: Information exchange

Purposes: To provide notification to anyone interested and to gather preliminary information that will improve public discussion.

Generally, before a formal examination of the options being considered in the decision, there is an exchange of information that helps everyone become more informed about the proposal and each other's needs.

Actions that can be taken during this stage are noted below. In all cases, the municipality will take action 1. In many cases, the municipality will also take actions 2 and 3. The options describe some methods that can be used. These are further described in section 2.

Actions	Some Options
1. Provide public notice	• Newspaper advertisements and online ads • Public notice bulletins on TV and radio with website link if appropriate • Direct notification to any interested community or organization / post information with follow up links in online community spaces and groups • Notice with utility bills • Notice on government website or citizen newsletter • Networking (personal discussion with individuals or small groups) • Media release targeted to local media • Personalized email outreach to bloggers • Email, newsletter, or text message invite/notification
2. Ensure people have the information they require and an opportunity to discuss the background information	• Bulletin, booklet or brochure (pick-up or direct delivery) • Library and municipal offices • Media releases and interviews with website link if appropriate. • Storefront, open house meetings or scheduled online chat sessions • Informal "doorway" meetings, call centre or social media "help desk" • Seminar/presentation/online webinar (guest speakers at organizations or events) • Frequently Asked Questions (FAQs), which can go on your website • Website with backgrounders and/or a blog • Links to website from social media accounts • Online video
3. Receive initial comments (perceptions and expectations)	• Drop-in to municipal offices • Focus group(s) • Storefront or open house • Informal "doorway" meetings • Online survey • Website or blog comments area • Presentation, followed by "Q&A" at interested organizations (e.g. Chamber of Commerce) • Call centre, social media "help desk" or schedule chat session • Networking (personal discussion with individuals or small groups) • Host a conference call or post questions through social media

Tip: Information notices and materials usually have to be ready before the consultation begins—so they are a critical step in your project timeline. These early information materials must **not** attempt to sell a single point of view. They should provide background information and focus questions that will be the basis for a "conversation."

Using focus groups early in the process

Focus groups can be used prior to the "public" discussion to test the information being presented. Participants invited to the focus group are asked to respond to specific questions or "mock-up" presentations. The intention is to learn more about how others perceive the situation, the municipality's role, and the language and illustrations being used to support public discussion. This pre-test can help municipal representatives see the consultation process through the eyes of those being consulted. Focus groups are particularly valuable when the issue being discussed is relatively complex, and the impact(s) on citizens relatively unknown.

Definition: A "focus group" is a meeting of 6 to 12 invited participants who are asked to give their opinion in response to specific questions, proposals or "mock-ups." The focus group works best when facilitated by someone independent from the municipality. Municipal representatives should not be in the room if they are likely to have a direct influence on the response of the participants.

Stage 3: Comparison of options

Purpose: Allow people to learn about available options and the benefits and costs of each.

Tip: The most common mistake at this stage of consultation is to present one credible option only—take it or leave it. This leaves the impression the decision has already been made and leaves little room to resolve conflict.

This is the stage that has the highest public profile because it usually involves public meetings and is often the time when differences of opinion become obvious. During this stage, the municipality (or the developer) will provide a comparative description of the available options to interested people and organizations. The intention is to allow people to learn about the available options and the benefits and costs of each.

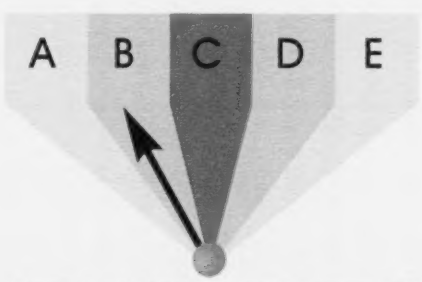


Figure 3: A decision is a choice among options.

During this stage, people often meet face-to-face to discuss options. Meetings can also be supplemented (or sometimes replaced) by other media, such as:

- telephone surveys;
- distribution and collection of paper or online questionnaires;
- website, discussion forum/social media discussion; and,
- scenario planning or digital charrette software.

Municipal staff (or consultants) prepare a description of the options in an illustrated format that encourages discussion and comparison. The purpose of meetings held during this stage is to learn about people's perceptions and preferences regarding the options. It is not unusual for new options to emerge during the discussion (especially combinations of parts of the options described).

Diversity of opinion at this stage should be expected—if all prefer the same option, why bother to meet?

What if there are no options?

Sometimes, there are no options about **whether** a development or activity will occur. In these cases, the public input process may be limited, for example, when a municipality has to replace a sewer line to increase capacity. In these cases, the public discussion usually focuses on **mitigation** rather than development options. Using the sewer line example, discussion would focus on matters where there are options about **how** the construction will proceed, such as:

- time of year when construction will occur
- length of time when sewer line will be affected
- factors that affect noise concerns, such as type of equipment, time of day
- alternate arrangements for affected households
- communication with affected residents
- safety controls around the site
- cost

When the focus is on mitigation of impacts, it is not usually desirable to hold a "town hall" meeting because of the risk of conflict that cannot be resolved. Impact mitigation is better discussed in formats that focus on "one-on-one" communication, such as open house, storefront (over-the-counter), or informal "doorway" meetings.

If you hold one or more meetings at this stage, think carefully about the kind of meeting to hold. A brief explanation of meeting types is provided below. The table also describes digital engagement methods that can be used to supplement in-person meetings. Further information about choosing a meeting approach is included in section 2, starting on page 2-20.

Type of Meeting	Advantages	Disadvantages
Storefront or **"over-the-counter:"** allows anyone to drop in and discuss plans "over the counter"	• Citizen can choose time to drop in • Citizen gets one-on-one time with municipal representatives • Great if a small number of citizens have a high interest	• Input is often verbal and must be recorded • Relatively time-consuming • Cannot accommodate large numbers • Caution about "busy periods"
Online "help desk" or scheduled online chat allows anyone to ask about the plans and talk to an expert (via Skype, Google Chat, AIM, Facebook Chat, message board or email)	• Residents can choose a time to drop in • Residents who cannot drop in during business hours or reach the location can still participate • Staff members can converse with multiple residents at once • Depending on how the "help desk" is set up, everyone's questions can be public, or they can just be recorded and not visible to everyone	• Harder to guarantee that participants are residents of the area in question • Needs terms of reference if everyone's comments are public in case abusive comments need to be removed
Informal "doorway:" small meetings that are informed neighbourhood discussions	• Builds trust and familiarity • Gathers in-depth information relatively quickly	• May require several meetings to cover all interested parties • Requires skill on the part of the municipal representative to keep discussion on track and record input
"Kitchen Table" choice books let residents organize among themselves, discuss an issue, and fill out an in-depth choice book either online or on paper (via SurveyGizmo, Fluid Surveys, SurveyMonkey)	• Uses people's existing social networks • Little staff time required to compile and analyze • Paper-submitted surveys can be manually entered into the online software to make analysis easier	• Choice books are time consuming to design well.

Type of Meeting	Advantages	Disadvantages
Advisory committee meetings: invited representatives meet several times to refine and discuss options	▪ Allows time for members to get to know one another and "do their homework" ▪ Builds consensus about detailed recommendations	▪ Committee may not be accepted by all communities ▪ Requires major time commitment
Webinar for presentation-style meetings (via LiveMeeting, Skype, GoToMeeting)	▪ People can attend from anywhere ▪ Easy to record and post online for people who missed the event	▪ Technical difficulties often arise, especially with video and sound
Round-table meetings: usually less than 20 people and includes a formal agenda	▪ Promotes exchange of ideas ▪ Good format for consensus building, if well facilitated	▪ Limited number of participants at each session ▪ Must be well facilitated and recorded ▪ Can be perceived as a technique to "divide and conquer"
Workshops: participants can "roll up their sleeves" and work together to assess information and create recommendations	▪ Promotes group problem-solving and exchange of ideas ▪ Can lead to creative recommendations	▪ Requires extensive preparation ▪ Must be well facilitated ▪ Requires time commitment from participants
Digital Charrettes, Scenario Planning, and Collaborative Writing let people work together over the internet (CrowdBrite, IdeaScale, Wikispaces, MetroQuest)	▪ People can participate at their convenience, allowing people who cannot attend an event to still provide input ▪ Text based format can encourage reflective discussion	▪ Somewhat challenging (but possible with registration that includes postal code) to identify which input came from local residents compared to residents of other locales ▪ Can be expensive
Town hall meetings: larger meetings with a formal agenda and formal presentations	▪ Involves many people at once ▪ Everyone gets to hear what everyone else has to say	▪ Media often attend because meetings can become confrontational ▪ Must be expertly planned and facilitated ▪ "Showboating" at the microphone is a problem
Open house sessions: an opportunity for people to drop in, review information, talk to a municipal representative, and submit their preferences	▪ Allows many people to review information and talk to representatives ▪ People can spend as much, or as little, time as they wish ▪ Non-confrontational format	▪ Will not result in any definitive input unless designed to do so ▪ Does not promote interaction or consensus-building among communities

Tip: If you're going to use online voting...

Be prepared to deal with groups that manipulate the outcomes. You can track IP (Internet Protocol) addresses to avoid multiple voting; however, this may discount many votes from one household, a library, or a business, where many people may share an IP address. Consider asking respondents to provide an email address or postal code.

Another issue with online voting is the tendency for frontrunner options to stay in the lead and win the vote. Consider randomly displaying the options or hiding the tallies until a visitor's vote has been cast.

Type of Meeting	Advantages	Disadvantages
Digital Engagement tools at face-to-face meetings include voting, surveys, text messaging /email /chat submissions for brainstorming and/or questions, live-Tweeting "take home" points from a presentation, etc.	• Allows people who are not physically at the meeting to participate • Facilitates sharing of main messages at meeting, with potential for "viral" spread • Potential to save time summarizing and analyzing engagement results	• Need to be prepared for technical difficulties. • Requires extensive preparation for engagement design and/or equipment set-up

Techniques that will improve most meetings:

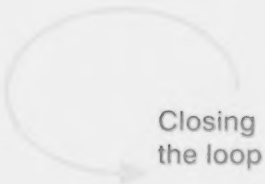
Tip: Encourage people to provide advice about the criteria (what do we want?) before they provide advice about the options (how shall we do it?).

1. Provide easy to digest information in advance through online tools or mailings. If you are using online tools, consider gathering early input and making use of what you've heard.
2. Have an agenda which includes topics and timelines.
3. Clearly state the proposal and the situation that requires a decision to be made. It is usually helpful to identify who will be making the decision (usually a committee of Council makes recommendations Council may or may not approve).
4. Describe the purpose of the meeting to ensure everyone understands the options and has the opportunity to express their preferences, concerns and expectations.
5. Provide a plain-language description of each option (illustrate, if possible) and a "starter list" of criteria, with the pros and cons for each option displayed.
6. Allow people to clarify their expectations and to add any comments about any of the options.
7. Provide a means for every person attending to indicate which option they prefer, and to submit comments about any of the options.
8. Make all of the options feasible—do not provide an option "sandwich" (i.e. three versions of the same option, with the middle version being the obviously practical choice).
9. Do not "sell" one option in preference to others. Remain open to suggestions about new options or new combinations of options.
10. Be particularly attentive to **concerns** or fears expressed about any option. These statements should be recorded. In the next stage, some form of mitigation or monitoring will likely be required if this option is selected.
11. Provide signup sheets to stay informed and involved

Stage 4: Implementing the decision

Purpose: Make a choice, while maintaining the trust of the communities affected.

When Council (or any other decision body) reviews the information necessary to support their decision, they should consider the public input they have requested. This input will provide insights into which options are preferred by the interested communities, and the concerns expressed about various options. Ideally, the interested communities (or citizens) should be informed that their concerns were directly considered and that either a) "we chose the option you preferred," b) "we considered other matters or limitations that led us to choose another option," or c) "we chose to modify the recommendation."



When the decision is to be implemented, the interested communities should be kept informed. In particular, if communities have raised specific concerns about the option chosen, they should be informed about how the potential impact they identified will be mitigated or monitored.

From the outset, staff and councillors should know they will have considerable communication work after the decision is made. Trust and open discussion are reinforced by the effort to let people know what happened as a result of their input.

Delivering public input opportunities

If you are delivering a level 2 or level 3 public input process, then the next section of this guide has been written for you.

Section 2

Delivering Public Input Opportunities

SECTION 2

Delivering Public Input Opportunities

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SECTION 2

Delivering Public Input Opportunities

1. Start early with a plan

It is valuable to ensure a public input plan is established early, in all cases, rather than simply proceeding "one step at a time" to gradually discover how much public input is really needed.

NOTE: If you have not already established a public input plan, refer to section 1 for guidance.

If you encounter confusing digital engagement terms, please refer to the glossary at the end of section 3 for guidance.

Ten questions to ask before you notify citizens

Section 1 of the Toolkit discusses planning and design of public input. Ideally, the planning begins with internal discussions. If you are expected to implement the public input process, you need a plan. It may be a written document, but it is often notes from an interview with the project manager. A plan can be done on one page, in one hour, over coffee (i.e. the "napkin plan"). Here are the questions you need to have answered:

1. What potential decision is being considered?
2. What are its implications?
3. Who should we be notifying?
4. What input do we require?
5. How are we intending to gather the input? How will be analyze what we hear?
6. What resources do we have available?
7. What are our timelines?
8. Is this likely to be controversial? If so, how should we manage the controversy?
9. How will the input be used in the decision?
10. What will success look like (i.e. what outcomes do we seek from our efforts to involve the public)?

If the answer to any of these questions is "we're not sure," then you need to do a little detective work to get a clear answer.

2. Appropriate effort to gain input

Section 1 of this guide describes a simple way to determine the appropriate level of input (level 1, 2 or 3). Refer to that section (starting at page 1-4) if you are in doubt about how much effort is appropriate.

Tip: Knowing the plan makes it much simpler to do a good job.

If you decide to use digital tools to supplement your consultation, you may want to evaluate your internal and external capacity for digital engagement. Resource 9: Evaluating Internal Capacity for Digital Engagement can help you with this task.

3. Teamwork

Teamwork is an essential part of public input gatherings. It helps immensely if everyone on Council and in the administration shares a common commitment to hearing citizens. In many municipalities, elected officials play an important role as part the team (see section 1, p.1-1).

Tip: Social media tools like Facebook and Twitter are social communication tools!

Sometimes, local governments give the IT department responsibility to manage social media tools just because they are online. In other cases, like in smaller municipalities, they are left to the front desk to manage. However, given the importance of good messaging and public engagement through social media tools, it is good practice for communications staff to manage social media tools, perhaps in collaboration with staff with content expertise.

There are several jobs that must be done, and it is important to participants that one person does not attempt to do all of those jobs simultaneously. Much of the credibility of public input processes comes, for instance, from a separation of the experts or advocates (those who are speaking about the content and benefits of the proposals) and the facilitators (those who are promoting open discussion and gathering all points of view).

Team member roles and responsibilities

Figure 4 illustrates the "basic" team you will require. The "coordinator" needed for level 2 or 3 may be a planner or manager or whoever seems best for the role. Also, you may have a specific digital engagement role; or, that function may be spread out between several team members. There are six functions or roles that have been identified, and several roles can by done by one person, or spread out among the team. The roles may be internal, contracted or a mix of both.

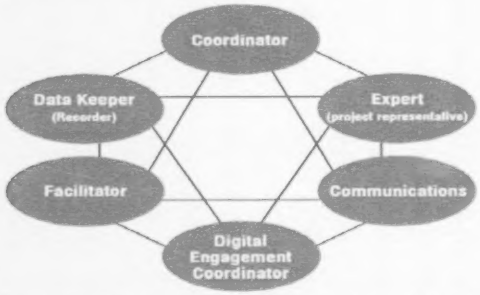

Figure 4: The team needed to support levels 2 and 3 public input.

The following table describes the various functions/roles. Functions may be spread out among team members.

Function	Description, Roles, and Responsibilities
Coordination	The coordinator is the "conductor of the orchestra." The coordinator ensures there is a plan, that timely preparations are made, and all public communications and public involvement opportunities are delivered according to the plan. In a perfect world, the coordinator does not get involved in the specific tasks of writing public information or facilitating meetings. The coordinator is an important liaison between the public input team and the decision-makers. The buck stops here: the coordinator is responsible for quality control, on-time delivery, and team effectiveness.
Digital Engagement Coordination	Sets up and manages project website, social media accounts. Chooses digital engagement tools that work well with internal and external capacity and project goals. Coordinates and oversees website and social media updates submitted by other team members, as well as team members responses to public input. Works with communications and legal functions to develop principles for how staff, elected officials, and the public should use digital tools, addressing privacy, security, and employee productivity concerns. Facilitates use of digital engagement during meetings. Monitors and evaluates effectiveness of digital engagement campaign.
Expert (Project Representative)	This is the "content" person. The expert is the person everyone asks about technical matters related to the project. The expert should also be the person who identifies specific limits (such as budget, specified timeline, Council directive, legislation, bylaws) and linkages (to other projects, timelines, decisions or policies)—a "library" NOT a "salesperson." *There can be more than one expert or project representative, but this role should never be shared with the facilitator role.*
Communications	The person(s) who produce the public information necessary to support public input. Their role includes advertising, media relations, production of written material and display/graphic materials. Often this person manages the website, social media accounts, and digital engagement campaigns.
Facilitation	The facilitator organizes and facilitates meetings and must support a productive discussion process in an organized, but neutral manner. The facilitator may be required to identify and mediate points of conflict and is often required to bring together the information from the public input sessions and consolidate the ideas in an unbiased manner. This person may use digital engagement tools during meetings.
Data keeping	Often, public involvement processes produce a lot of advice and questions. Someone has to record all the information generated and produce a database that allows everyone to see the ideas, questions and concerns generated, and how they have been addressed. This role

Tip: Consider integrating these roles in your staff job descriptions to ensure that staff know that these tasks are an organizational priority and each are aware of their responsibilities.

Tip: Allocate approximately an hour every day to engage digitally, by listening to your residents online, replying to their comments, and posting new content.

Tip: Only start online conversations you can stay involved in. Make sure there is a point person in charge of responding to emails, social media channels and keeping the webpage updated.

may also involve attending meetings and keeping a record of those meetings. Ideally, the data keeper(s) provide a single reference source for all public input received. An important part of this role is recording all digital engagement, especially interactions with the public on social media sites.

Some roles can overlap. For instance, the facilitator can also be a data keeper or a communication person. The coordinator can similarly also be an expert, or provide communications support to the project. If consulting online, your digital engagement tasks may be given to many team members. However, the expert or the project coordinator should avoid acting as the facilitator or as the data keeper.

Staff must decide if they are acting as the expert/project coordinator, or as the facilitator/data keeper. DO NOT do both as you risk losing the trust of stakeholders. As an expert, you express certain views or values that may be seen as a "bias" (after all, you are trying to get this project completed). As a facilitator, you must be open to all points of view and give them equal attention.

If you are trying new engagement techniques, consider whether your staff need additional training or could benefit from outside expertise. If an intern or temporary employee is leading the day-to-day maintenance of your online presence, ensure that this person will be able to work on the online activity for the duration of the project, or make certain that another staff member takes over the task so that the site continues to be maintained and updated.

Is public input a part-time job?

If public input requires a level 3 process, it is highly recommended at least one team member (usually the coordinator, but often one or two others) be assigned to the process on a full-time basis. It is very difficult to balance other roles and tasks when the public input process is underway.

Most team members can balance their work on the public input process with other duties, but all must be prepared for the public input process to intrude noticeably on their other duties. After-hours meetings are normal, and often the timelines for consolidating notes and preparing new drafts are short. Team members may also be required to spend time preparing and presenting information to administration or Council.

Is digital engagement a part-time job?

Engaging with the public online is something that takes a little time on a regular basis and is manageable during work hours (mostly!). If you decide to try online engagement, keep in mind that at least one full time staff person is required to coordinate a large digital public engagement project, half time if the digital engagement is limited. If you choose to incorporate digital engagement as part of your municipality's day-to-day activities, a staff person should dedicate approximately 1/3 of their time towards your government's social media presence.

Scheduling the public input process

Usually, public input is tied to a specific schedule (e.g. approval of a project or passage of a bylaw). However, you should allow time for delays that are outside of your control. Delays can arise from a variety of sources, but the most common delays are listed below:

- approval of the public input process by Council or senior administration;
- research (finding and consolidating the information you will require to answer questions and fully inform citizens);
- approval of the information pieces you intend to give to citizens (often, administration, elected officials, legal and communication advisors must meet; the approval process can take up to four weeks);
- production (writing, artwork, printing) of information pieces (after approval, it can take two weeks to finalize artwork and layout and publish the handouts);
- choosing, setting up and training to use a digital engagement tool (you may already have all the tools you need ready to go, or you may choose to experiment with something new, which could take as little as two weeks to be ready with an out of the box tool, or as long as eight weeks for a more elaborate tool);
- appropriate meeting rooms not available (if meeting rooms must be rented, you may be delayed if the rooms have not been pre-booked and are not available); and,
- public notification (media placements) may delay your timeline if the media space has not been pre-booked.

Tip: Sometimes digital engagement happens outside of work hours.

You can look at your stakeholders' email addresses to see if they have given you work or personal email addresses to see whether it would be better to contact them during or outside of work hours.

Often the best time to reach people is from 9am to 3pm on Twitter. On Facebook, reach people before noon on Wednesdays and Fridays.

If you have more capacity for digital engagement, you can use an application such as Timely or HootSuite, which automatically schedules tweets to create the maximum impact and reach.

Tip: If you plan to use digital engagement, think about when you need to start using the tools and how long it takes to get them up and running. The amount of time required to get going depends on:

- How many tool options there are and who is involved in making the choice
- Procurement rules and organizational requirements to approve use of the tool
- Customization and reporting set-up
- Staff training, if needed

Timelines for public input processes vary greatly, depending on the topic and situation. Typically, the preparation needed to support information exchange (stage 2) and comparison of options (stage 3)[1] takes longer than people expect (up to 8 weeks). Here is what you need the time for:

Activity/Task	Timing
Preparing public information	▪ Allow 4-6 weeks for research, writing, editing, layout, artwork and printing (more time is better) ▪ Book any "out-of-house" printing as early as possible, if specialty printing (e.g. four-colour posters) is required ▪ If you require scale models, allow more time (6-8 weeks) ▪ Set up website (4-6 weeks for existing, 3 months for new) ▪ Establish social media accounts (3 hours) ▪ Test digital engagement software to be used before it goes live (e.g. surveys, blog comments) (1-2 weeks)
Final copy approval	▪ Find out what is involved in getting approval to take your copy to the printers. In many municipalities, you will have to allow 2 weeks to get final copy "signed off" ▪ Approve content for website, social media accounts, online announcements (2+ weeks, best if done concurrently with website design and setup)
Booking speakers or facilitator for meeting	▪ If you need a specific person (such as an elected official, an independent facilitator, or an expert on the topic), they may require more than 4 weeks' notice
Pre-meeting contacts	▪ Contact with the interested communities well before the public meetings is recommended ▪ Make sure communities are aware of the public input process and ask them about their expectations (e.g. timing, location) ▪ Develop and maintain relationships with online community, keeping in mind that the relationship will continue after this particular event. ▪ Begin an email list of contacts
Booking appropriate venue	▪ In many municipalities, there are only one or two rooms that will suffice, and they must be booked more than a month ahead. ▪ If required, ensure the room can support digital engagement by providing wireless internet, for example.
Getting appropriate equipment	▪ If you require any specialized display equipment or audiovisual equipment (projector, laptop, projector screen, etc.), it should be booked about 10 days in advance

Tip: Producing public information takes longer than you think. Finding graphics, getting approvals and printing all take time.

[1] The stages involved in a level 3 public input process are described in section 1: Leading a public input process.

Notifying stakeholders and public	▪ If specific stakeholder organizations are to be invited to the meeting, they usually appreciate notification of the date more than 4 weeks ahead ▪ Public notice of the meeting should be posted (that means you already have approved copy) 2-3 weeks before the meeting, and again approximately 1 week before the meeting. Media space should be booked at least one week ahead of the day of posting. ▪ Ideally, there will be reinforcement of the meeting dates a few days prior to the meeting. You can supplement posted notifications with early and reminder notices by email, your website, and via Facebook and Twitter. ▪ Note: the MGA requires public advertisement for two consecutive weeks for all statutory plan and land use bylaw adoption and amendment decisions ▪ Check the MGA to determine whether or not other requirements apply
Team training	▪ Team training for the public event should happen close to the event (only 1 or 2 days in advance)

The timeline illustrated in Figure 5 is rarely shorter than 6 weeks. Typically, it is 8 to 10 weeks. If holidays (Christmas, summer) or activities (harvesting, calving) intervene, and the project is complex, the process can take over 30 weeks. For budget implications of your scheduling decisions, you may find it helpful to see:

Resource 2: Budget considerations for public engagement (worksheet)

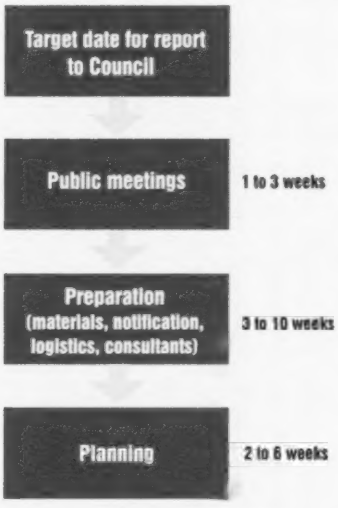

Figure 5: Plan back from your target date.

4. Good communication materials

Good communication materials are an essential part of the public input process. The key to good communication materials is to design the communication from the context and perspective of the receiver, rather than the knowledge and expectations of the sender. Key questions to ask are: "What does the receiver want to know?" and "what misconceptions might interfere with our conversation?"

It is difficult for an expert on a topic to write good public communication materials. They simply know too much about the topic and have difficulty returning to the initial point of enquiry that led to the decision now being discussed.

Simple Test

Show your communication materials to two people—an expert and a community member. If the expert says they don't provide enough background information and the community member thinks they provide good information, then you are on the right track.

Writing "open" information

If the information provided to people appears to "sell" one option solely, or in strong preference to other options, it may be discredited. Similarly, if information favours the perspectives of one community over another, it may become fodder for an argument.

Tip: Written information is intended to stimulate thought, not provide all the answers.

Information materials should be conceived, written and illustrated as if they were an educational pamphlet on the topic being discussed. The writer should be aware of the perspectives of the potential readers and write in a manner that appeals to the reader.

An outside editor should be asked to read the material "cold" (i.e. without knowledge of the project) to ascertain whether or not the information is "reader-friendly" and the presentation is as unbiased as possible.

My perceptions of the project
What I am hearing from others
Remember: The receiver may be confused by possibly conflicting "other" messages.

Figure 6: Good communication is designed for the receiver.

Make the scope of discussion obvious

Be specific about what is "on the table" for discussion. If necessary, point out the boundaries of the discussion.

Keeping it simple

The toughest part of writing public input materials is deciding what to leave out. People will spend very little time reading the material—so be selective about what you need to say. It is often useful to keep the basic message simple, but then add detail and illustrations for the more intrepid reader, and for use in public discussions. On the internet, try to keep messages to 150 to 200 words.

Tip: When publishing content online, don't forget to keep it short, interesting, timely, and regularly updated!

Illustrations are important

A "concept picture" or a process illustration will become a major discussion point. It will attract attention and improve memory of the information. Colour improves attention and memory. However, if four-colour production is too expensive, two- colour or one-colour (shades) production is well worth considering. When updating the website or social media accounts, don't forget to add pictures and videos!

Tip: 30% of online Canadians go online while travelling from one place to another, most frequently with a smart phone (64%) or laptop (30%); therefore, messages and calls to action must be clear and succinct. As well, make sure your online resources are mobile-friendly.

Targeting information

Writing a single information piece that appeals to everyone and covers all aspects of the problem can be difficult. In some cases, it is much better to prepare several versions of the information.

The most common example of this is having a simpler version for the casually interested citizen and a more specific version for vested stakeholders who have a direct interest and significant technical knowledge of the matter being discussed. Remember that people tend to speak informally on the internet. Content that sounds like a press release or technical report won't be as well received online as a conversational and easy-to-read piece.

5. Information formats and publication

The format you choose to communicate your information will largely be determined by three factors: your target audience, your topic and your budget.

Choosing a format for your information

First, determine how you plan to get information from people (i.e. meeting, open house, survey), then develop the published materials you need to support the process. Often, it is desirable to tie the "background information" format to a "response form." People can then, for example, be directed to "see page 3 before answering the question."

Here is a basic guide to the most common information formats:

Format	Advantages	Limitations
Website	▪ Many people go online first for information ▪ Provides up-to-date information ▪ Can include links to a wide range of information ▪ Allows the participant to choose how much to review ▪ Can be linked to an electronic response format	▪ Website must be kept operational and up-to-date ▪ Relatively expensive to establish a good functional site from scratch ▪ Participation information can be easily lost in the plethora of municipal information ▪ Not everyone can access information on the web
Colour brochure	▪ Concise and graphic description of information ▪ Provides a standard reference for participants	▪ Often difficult to get into the hands of participants ▪ Expensive to publish ▪ Easily lost ▪ Takes a long time to write and publish (approvals are often not easy)

Tip: Published materials are designed to support the discussion process.

Display Boards	• Concise and graphic description of information • Provides a standard reference for participants • Can be produced on moderate notice	• Only available to those who attend display locations • Can be costly • Easily damaged • Require people to set up, take down and explain
PowerPoint/ slide show	• Concise and graphic • Provides the information needed in relatively short time • Good support for live presentation of information • Use of pictures and colour graphics enhances learning • Can be presented and shared online as part of a webinar. Recordings of the webinar can be posted for individual viewing. • Ability to "Tweet" take-home messages during presentation (appropriate for large presentation)	• Rarely a "stand alone" format (needs someone to present) • Format tends to be "lists without context" • People are getting over-exposed to the limited format • Limited access (meetings primarily) • Not a reference piece unless people get a printed or electronic copy of the slide content
Newsletter or leaflet (online or by mail)	• Relatively inexpensive • Provide information overview • Can be distributed with other materials, like surveys	• Can be mistaken for junk mail • Not durable • Will not be read if too "wordy" • Can be challenging to develop good email contact list
Facebook Page	• Provides up-to-date information and directs traffic to website • Easy for people to share with people they know • Easy way to ask questions or conduct a poll • Effective for driving traffic to main website	• More challenging to share documents • Not accessible to everyone, because participation requires setting up a Facebook account
YouTube page or Flickr group	• Share information in a fun and engaging way • Videos and pictures can be embedded in your main municipal website to keep users focused • Easy for people to share with people they know • Easy to solicit videos or photos from the public	• More resource intensive to develop multimedia, especially video

Notification and distribution of information

Ideally, everyone potentially interested in providing input to the decision(s) you are considering will be notified, be aware of the coming decision(s), and be aware of the opportunity to provide input. However, this can be challenging—there are a few barriers to consider:

1. Information overload—most people receive so much unsolicited information they automatically discard or ignore the majority of it.
2. Competing messages—it is easy for people to confuse your message with others.
3. Distribution costs—it can be expensive to get information delivered directly to everyone interested in receiving it.

No notification system is perfect, so give yourself credit for your efforts to get the message out. Consider the following:

1. The *Municipal Government Act* (MGA) specifies notification requirements in some situations.
2. More than one notification process is generally needed to achieve success.
3. Word-of-mouth stimulates the most attendance at meetings, while standard notices in print media result in the least attendance.
4. A single image or eye-catching theme will help attract attention.

The following techniques, along with their advantages and limitations, are listed in order of effectiveness:

Techniques	Advantages	Limitations
Person-to-person (face-to-face, telephone, or individual email)	▪ Most effective approach ▪ Allows respondent to ask questions and get involved immediately ▪ Highly recommended if you need to invite a relatively small number of individuals	▪ Time-consuming ▪ Limits number of contacts ▪ Remember that people are tired of unsolicited sales calls
Leadership networks (contacting known community leaders, or online influencers, and giving them the information)	▪ Can be very effective, but depends on the skill of the leaders contacted and time available	▪ May be seen as "favouring" certain parties ▪ Tendency to attract the same people to meetings repeatedly (no matter what the issue) ▪ No control over how or when leaders will distribute the information

Techniques	Advantages	Limitations
Direct correspondence (letter, bulk e-mail, fax, e-newsletter, text message)	▪ Relatively effective ▪ Targeted to those who require notification	▪ Requires up-to-date mailing list ▪ Expensive for large distribution ▪ Need to use e-newsletter service, like Constant Contact or Mail Chimp, if email list is large to avoid email being marked as spam
Presentations at regularly scheduled meetings	▪ Provides on-site presentation at meeting organized by target group or association ▪ Very convenient for group members ▪ Promotes early involvement and learning ▪ Promotes networking	▪ May delay process—waiting for scheduled organization meetings ▪ May be seen as "favouring" organizations ▪ Requires a significant commitment of time (often evenings/weekends)
Bulk mail	▪ Covers a large area with relatively high assurance that each household and business are informed ▪ Relatively low cost	▪ Likely to be confused with unsolicited sales information ▪ Often discarded
News release (press release to traditional media or online media)	▪ Can create interest and attention if picked up by media ▪ Can provide background information that may stimulate interest	▪ Media tend to feature human interest stories that are interesting, timely and topical ▪ No control over when and where media will show the story ▪ The story may include misinformation from other sources
Displays, signs and bulletins	▪ Stimulates interest if placed in or near affected location ▪ Format requires simplicity and graphic approach	▪ Effectiveness depends on immediacy—close to location of change, close to time of change ▪ Relatively expensive to do well (exception: bulletins) ▪ Bulletins are cheap, but are often lost in a forest of other bulletins
Public notice in media	▪ Required by MGA ▪ Some people review public notices as a matter of course	▪ Relatively small impact on number of people who get involved, unless there are leaders who distribute the information through their network

Techniques	Advantages	Limitations
Social media presence (accounts on Facebook or Twitter)	▪ Meets residents where they are comfortable online ▪ Easy for residents to share information with people they know	▪ Online community requires regular updating and timely responses ▪ No guarantee that participants in the online discussion or group live in your jurisdiction

Your final choice will in all likelihood be an amalgam of the above options.

6. Making public meetings enjoyable and effective

Presenting information

People who take the time to attend public meetings should leave those meetings feeling well informed. However, in many cases, people sit through presentations that don't help them learn. This can be easily remedied.

Tip: People only remember what they think is relevant to them.

1. **Your audience will learn more when you say less**
   The average audience member will be attentive for about 10 minutes (most speakers assume 30 to 40 minutes). Start with the presentation you think you ought to give, then cut it in half.

Tip: People usually question and learn because they have a need. They rarely memorize information *in case* they will have a need.

2. **Few people memorize facts**
   If you attempt to present all the facts before people have a chance to ask questions, you will be disappointed with the level of understanding among participants. It is better for people to be able to ask about the facts as they consider the options being presented. Municipal staff can help people "find" the facts when they need them. Handouts are important because they provide a reference tool for participants.

3. **People learn by interacting with people**
   While people politely listen to presentations, their learning rate is relatively low. Learning is much higher when they are talking to others and examining information. People learn through a combination of auditory, visual and tactile information—and they learn better when they are not sitting still.

4. **Some methods definitely help people learn**

   The following "embellishments" to a presentation will help people learn information and increase participant satisfaction:

   - Connect the information to familiar situations or common experiences.
   - Use colour pictures, photographs, and videos (especially when they show familiar places or people).
   - Use humour to support key points in the presentation (this is different than telling jokes).
   - Show your own enthusiasm about the topic.
   - Ask others to contribute questions or ideas and pay close attention to what they have to say.
   - Make eye contact and smile.
   - Provide opportunities for people to get active during a presentation. For example, give the audience access to interactive maps, a scenario game, or a calculator. You can also ask the audience to vote or give feedback via text messaging, special hardware, or traditional methods such as sticky notes or coloured dots.
   - Make "take home" messages easy to communicate and share, for example by tweeting key ideas or statistics

5. **Other methods should be used with care**

   - Abstract graphics (graphs, maps, process diagrams) can be useful learning tools, if you understand that many participants will have trouble understanding the message encoded in the graphics. It looks crystal clear to you, but it may not make sense to others. You can overcome this difficulty if you use the graphic as a "prop" for your story, not as a self-explanatory learning tool.
   - Technical data is even more difficult for people to understand. Describe what experts have concluded from the data, but leave the data aside for questions. Those who ask questions about the data will be motivated to understand. You can use scenario planning software and calculators to show the impact of data and help explain trade-offs.
   - Case studies or explanations of experiences elsewhere can be useful occasionally, but they must be concise. A one-minute case study is more likely to be remembered than a 15-minute case study.

One method should be avoided

Selling one solution as the answer, without reference to other options, raises doubt and resistance. The more enthusiastic you are about one solution, the more energy others will have to oppose you. Things will get worse if you respond defensively to criticism of your idea.

Presenting options

The reason for meeting presentations is to help people learn about the options they are being asked to consider—to help them make informed choices about what they want to see in their municipality.

Ensure that people attending the public meeting are aware they are providing advice to Council about which option they prefer and why.

Tip: Your role at public meetings is to help people evaluate choices.

The following describes how options should be presented at public meetings:

1. **Describe the current situation** to participants. Why do we need to make a choice?
2. **List the criteria** that describe the ideal choice (e.g. no change in cost to property owners). Explain that you want their input: Are there other criteria that need to be considered? Should some of these criteria be changed?
3. **Show the options** being considered—ideally, presented side-by-side. This approach helps visual learners see the available choices. Explain that you want their input. Are there other options?
4. **Compare the options** against the criteria. It is important this part of the presentation be comparative: Which option seems to perform best? How do the other options compare to the best performer? Citizens have elected Council to make decisions; now they are informing Council of their preferences and concerns. Figure 7 provides an example of how to illustrate and compare choices in a way that will promote discussion and learning.

Criteria	**OPTION 1** Incinerate 1/3 of solid waste	**OPTION 2** Reduce waste production	**OPTION 3** Extend size of existing landfill
Cost			
Impact on life of landfill			
Impact on residents			
Other considerations			

Figure 7: Comparing options at a meeting.

5. **Encourage identification of concerns about each option** by participants. It is valuable for people to identify their concerns as they describe the potential for undesirable consequences. This supports a risk management approach. When the planner (or municipal representative) informs Council, she/he

should also inform Council of the concerns participants identified and identify possible ways to mitigate the concerns (or manage the risk).

Supporting public discussion

The following list describes the elements most often needed for an effective public meeting:

1. **An agenda or display plan**

   Whenever there is group discussion, an agenda is needed to provide a basis for managing the meeting. The agenda describes the purpose of the meeting, the topics to be discussed (along with the time allocated for each topic), and the intended outcomes of the discussion. If you are hosting an "open house" session, a display plan takes the place of the agenda.

   However, the agenda must be followed to be effective. A chair person or facilitator should be responsible for keeping the meeting "on track" with the agenda.

   Resource 6: Sample meeting agenda, and
   Resource 7: Sample display plan for open house meetings.

2. **A facilitator**

   Although not always required, a facilitator is someone without vested interest in the outcome of the meeting, who is prepared to devote all of his or her attention to supporting the discussion process, ensuring participants have an opportunity to submit their views, and that all views are recorded.

DO NOT place someone in the difficult position of being the main proponent of the plan or recommendation AND at the same time trying to be the facilitator (or chair). This approach reduces the credibility and effectiveness of that person.

3. **A record of contacts and advice received**

   Following the meeting, councillors often ask two questions: Who came? What did we learn?

   A record of meeting attendance is essential—a sign-in sheet is recommended. If desired, you can ask people for their email address and whether they would like to stay updated about the project. However, you should consult an advisor on the *Freedom of Information and Protection of Privacy Act* (FOIP) regarding proper procedures for record-keeping.

   It is equally essential that all input received be documented and recorded. When Council makes its decision, there should be a report that links the decision to the input received. For in-person meetings, this may take the form of minutes. For digital engagement, you may have webinar transcriptions or video, chat transcriptions, or website screenshots.

Resource 8: Guide for facilitators and recorders

Tip: Experts gain credibility with participants when they carefully listen to questions and suggestions.

4. **Expert advice**

   Since people cannot be expected to memorize and understand all of the information presented to them, it is always helpful to have an expert attend who can make brief presentations and (more importantly) can answer questions as they arise.

5. **Suitable location**

   The best location for a meeting is one that (a) everyone can get to easily, (b) has enough room to comfortably accommodate the numbers you reasonably expect, and (c) has suitable facilities to support your meeting. While you cannot always get the best location, your chances are increased when you book as early as possible.

6. **Time management**

Most people who attend municipal meetings want them to be efficient. They plan to spend 90 minutes or less in the meeting. Don't spend any more time than necessary to have a good discussion. It is easy for the discussion to get "off track" (usually too detailed). The facilitator must ensure the agenda is followed as closely as possible to ensure all topics get discussed within a brief (but sufficient) time.

Note: In open house format, participants can manage their own time. Most participants will spend less than 45 minutes on site, but a few will choose to stay for hours.

7. Choosing and implementing the best approach

You can choose a meeting format based on the topic, the target audience, and your budget. Please refer to the description of meeting formats provided in Section 1, starting on page 1-22.

The following provides some advice to help you choose the appropriate format and to implement it well.

In Person "vs." Digital Public Involvement Methods

There are many ways to bring the public together for productive conversation with your municipality. Often, the best solution is a mix of techniques. This table identifies the strengths of various approaches.

Benefits of Public Involvement Methods

In Person	Online	Mobile
▪ Intensive and focused participation ▪ Build direct and strong relationships ▪ Tap into group creativity ▪ Manage engagement atmosphere ▪ Act as project milestones ▪ Create visibility with target audiences	▪ The public is online and expects its services & government to be there too ▪ Possible to increase number of people engaged for reduced costs, compared to face to face ▪ Easy to have multiple and ongoing interactions ▪ Can foster deep issue exploration ▪ Today's Internet is participatory by nature and many tools are low cost	▪ Phone is always with you, always on ▪ Geo-location engagement and tracking allows for personalization ▪ Free tools available ▪ Great for connecting with some hard-to-reach demographics

For decisions affecting only a few people

Use one of the following methods to discuss matters with these people and gain their input:

- Personal meetings (one-on-one, often with you visiting them).
- Storefront meetings (generally "over-the-counter" with one or a few people at a time).
- Informal "doorway" meetings (meetings with less than 10 people, usually held in someone's house or business, with no formal agenda).
- Small email listserv (a self-managing email list system, like Majordomo or Google groups, where someone sends one email which is received by the whole mailing list).

All small meeting formats depend on your ability to give people your attention and to provide credible information in a friendly manner.

For decisions affecting more than 10 people

You must choose whether you want to implement an **open participation process** (i.e. hold a series of meetings that anyone can attend), or whether you want an **invited participation process** (i.e. invite a representative selection of people to address the decision prior to the Council hearing. For example, invited representatives participating in a committee or round-table discussion).

Tip: It is easy to include digital engagement in your open house stations! Possibilities include:

- interactive maps/scenario planning/calculators
- survey/voting
- video/photo slideshow
- website
- online forms for commenting

First, let's address the open participation processes:

1. **Open house meetings**

   Open house meetings typically employ a series of displays to present information to interested citizens. These meetings are useful when you cannot predict the number of people who will attend (they can accommodate a wide range of traffic). The format allows people to come at a convenient time and spend as much (or as little) time on-site as they wish.

   Resource 7: Sample display diagram for open house meetings

   Open house meetings are convenient and they avoid controversy because different stakeholders do not have a venue for a public exchange of ideas.

   Advice: You must manage your open house meetings to gather advice and input from the people who attend. Staff should actively interview people at each open house "station" and note any ideas expressed. A response form should also be provided, along with a "work area" where people can complete the response form and exchange ideas. Response forms should

be collected before people leave the open house. Very few people send in their forms later, even if they say they will.

2. **Town hall meetings**

This is what most people think of when you say "public meeting." In its worst form, these meetings can lead to vocal disputes and grandstanding (why the media make it a priority to attend). This format of meeting allows you to talk to a large number of people at one time, and to hear from some of those people.

Tip: By broadcasting the meeting asking for questions online, you can ensure that even people who can't attend the meeting in person can still participate. To help prevent malicious comments, avoid allowing anonymous questions.

Advice: Town hall meetings are often associated with grandstanding, attacks on administration, and uncivil behaviour. You must design your meeting to avoid stimulating such activity. Here are some ways to ensure your town hall meeting is civil and contributes to shared agreement rather than enmity:

- Do not seat municipal/project representatives at a table at the front of the room, facing the audience.
- Do not have microphone stands in the middle of the room. Instead, use roving staff with hand-held microphones. Do not attempt to "get by" without microphones.
- If possible, have people sit at tables rather than in classroom rows.
- Use a facilitator.
- Make personal contact with people as they arrive and during breaks.
- Make sure community representatives are well informed before the town hall meeting occurs.
- Avoid long presentations by municipal/project representatives at the beginning of the meeting. Invite community representatives to present their perspectives early in the meeting.
- Have someone take notes of comments received.
- Have the facilitator ask people for their cooperation and immediately caution anyone who engages in personal attacks, inappropriate language or fear-mongering.
- Make sure people can provide their input without everyone having to get up and announce their views to the crowd. Suggestions include:
  - handing out response forms to each person attending and collecting the responses,
  - providing a suggestion box where people can submit their written views,
  - encouraging people to post their views on the displays, using Post-It® notes.

3. **Workshops**

These are longer meetings and require a greater degree of commitment from participants. Seating is at round-tables (i.e. in smaller groups) and participants are given specific instructions about preparing their input to the meeting. Each smaller group is asked to identify their response to the questions raised and to present them to the plenary (larger group).

Advice: Workshops require participants to be together for at least four hours; usually longer. Make sure you provide refreshments, meals or snacks (as necessary). The discussion process has to be carefully designed, recognizing that each report-back from each table can take 10 minutes or more allowing for questions of clarity (six tables reporting back can take an hour!).

You can avoid repetitive report-backs by having a group consolidate all the ideas for reporting to the plenary, but consolidation can take more than 30 minutes, so it should be designed to happen over a lunch break. If the smaller groups go to "break-out" rooms, you have to allow 15 to 20 minutes transition between plenary and break-out discussions (and vice-versa).

Tip: Some workshops can take advantage of digital engagement tools, like online charrette software, online brainstorming, and collaborative writing tools.

4. **Online Discussions or Idea Generation**

These are online spaces where people can read information, comment on someone else's idea or add their own opinion. Online formats allow you to reach people who are unlikely to attend an in-person meeting. They also give participants an opportunity to participate at their own level of commitment (one short visit or multiple, longer visits).

Advice: Use resource 3 to help define the specific questions and tasks that are appropriate for public input. Use resources 9 and 11 to help you choose your tools. Be sure to have a moderator who can support useful conversation and connect participants with experts as needed. Consider inviting content experts or elected officials to participate in the discussions. Be sure to plan ahead on how you will analyze and report on the ideas you hear during the online event.

Now, let's look at the invited participation processes:

1. **Focus groups**

Focus groups invite a cross-section of people to attend representing the full range of stakeholders. Participants are shown a series of statements or ideas and asked for their response. Participants may be asked specific questions and every participant is asked for an answer.

Advice: Focus groups are not to "sell" ideas, but to "test" ideas. The meeting must be designed so participants do most of the talking. Participants should be given options to compare, and the best information will come from their comments about which option they prefer and why. It is best to invite people other than the community representatives you regularly see (i.e. not the formal community spokespersons).

Tip: If your focus group involves testing software or a website, group participants in pairs so they can help each other out.

2. **Round-table meetings**

Meetings where 15 to 25 people are invited to sit "around the table" and provide their perceptions, concerns and preferences. At these meetings, everyone stays in the plenary most of the time (although there may be times for private discussion). Short presentations are used to provide information then participants are asked to provide their views and ideas. The intention of a round-table process is to encourage sharing of ideas among communities that have different needs or perspectives and to ultimately encourage cooperation and consensus-building.

Advice: It's important to consider who will be invited to a round-table meeting. Often, the presence of known community advocates or representatives is important to the credibility of the meeting. Presentations should be short, with emphasis placed on hearing the people who attend. A record of the discussion is important. Even better is allowing people to see the record (e.g. on a screen or flipchart) as it is being recorded. It is valuable to have a means of testing each idea presented: Do most people agree? At the end of the round-table, summarize what has been learned, including points of consensus and points of disagreement.

3. **Advisory committee**

This is very similar to the round-table process, except the committee meets several times and participants are therefore more likely to feel they have been heard, and are more likely to achieve consensus on difficult topics.

Advice: Someone needs to be the "secretariat" for the committee (keeping notes, giving out assignments, following up on actions, and arranging meetings). Someone must be assigned to prepare a report for the committee. This is no small task. Committee members will scrutinize the report closely, and the report is often the focus of discussion that leads to consensus. Usually, it is helpful to include a description of any points of disagreement in the report.

Evaluation forms

Should you ask people who attend a public meeting to evaluate the session? It is not mandatory to do so, but it is recommended. It is easy to make a paper evaluation form and link to an online form available at the meeting. An evaluation of the meeting(s) can provide two important pieces of information:

1. People's preferences for future meetings.
2. Documentation of the level of satisfaction of people who attended the meetings.

In general, four items require evaluation:

1. Was the information provided easy to understand?
2. Did the meeting provide an opportunity to learn more about the proposal(s)?
3. Were peoples' suggestions or concerns raised at the meeting?
4. Do people have any suggestions for future meetings like this?

Tip: When writing a blog post, read some of the blog's posts for appropriate language and tone. Bloggers aren't likely to post articles that read like press releases.

Working with the media

A good working relationship with the media can be of great assistance in conducting public input exercises. It is a good idea to have a relationship with a few reporters who will answer your call when you want to get your story out to the public. Here are a few guidelines to help you work with the media:

- Think of media coverage as a good thing. After all, you are trying to inform your citizens and get them involved. (You may want to discuss media relations with administration. Some administrators believe "the less media coverage, the better.")
- Treat the media as important stakeholders. Give reporters the information as soon as you give it to everyone else.
- Assign one person to answer media enquiries about your project. If you have an ongoing advisory committee, designate one person (usually the chair) to handle media enquiries.
- Be friendly and approachable. If you have a good relationship with reporters, it will often affect the tone of the coverage and the amount of coverage given to your event.
- Give reporters materials they can easily use and understand. If materials are already designed for media use, they may be included in the story. You want reporters to have their facts straight.
- If TV cameras are going to be at your meeting, make sure you prepare a place for them to set up where they will not be intrusive. Inform cameramen they

may not walk their camera through the meeting room while the meeting is in progress.

- Ask reporters to conduct interviews at breaks or outside the meeting room. Inform your stakeholders they may be approached for an interview—they can choose whether or not they want to be interviewed.

Working with online influencers

Developing a relationship with people who are influential online, such as bloggers, can help you anticipate disagreements that may arise during an engagement process as well as help spread your message online. Here are a few guidelines to help you establish a relationship with online influencers:

- Connections with bloggers can be made by asking bloggers to post articles that you have already written, which is easy for them.
- Some websites have an area where readers can submit a tip or a link, which can be a good way to reach out to relevant interest/community groups.
- Don't forget Twitter! Twitter tends to have strong topic-based communities. So, having a group of followers who will retweet messages can ensure that your message spreads broadly.

8. Stakeholder relationships

Remember, building trust with stakeholders is just as important as achieving good decisions. Following are some important behaviours that will greatly improve the trust of your stakeholders:

Six behaviours that improve stakeholder relationships

1. **Keep promises**

   Nothing increases trust like a promise kept. You should go out of your way to make some promises as part of your "good service" attitude and then keep them. You might, for instance, promise to send several people a map of the proposed walking trail by Tuesday. Or tell someone you will have the public works manager contact them. When the promise is kept, trust goes up. If you cannot keep the timeline, you gain trust when you call to explain that you will be late. Do not make promises you cannot keep.

2. **Be clear about scope**

   Clarify what is "on the table" for discussion. It helps everyone to know what is not "on the table." If people have other issues to raise tell them where these issues can be directed. Be clear about any limitations or preceding commitments that may limit what is up for discussion.

3. **Demonstrate a "good service" attitude**

   You are the host of the input process, so you should go out of your way to greet people, make them feel at ease, ensure they have a place to sit and the meeting materials at hand. Your enthusiasm about having people in the room will be infectious.

Tip: If you are using a digital engagement tool to stay in touch with stakeholders and they only rarely use the tool, be prepared to try something else. Your group members may not be comfortable using it.

4. **Keep in touch; verify information**

   Once you initiate contact with stakeholders, don't let long periods of time go by without contacting them. If they hear nothing after they have given their opinion, they will assume the worst.

   Keep a record of comments received during the process, and make that record available. Ask people to verify that you heard them correctly. Ideally, decisions should be made in a timely manner. However, if the decision stalls, let stakeholders know the reason for delay. In the absence of facts, rumours arise and gain credibility. As a rule of thumb, 3 to 4 weeks without contact will cause people to speculate on "what is <u>really</u> going on."

5. **Be accessible**

   If people find it easy to reach you, they will trust you more.

6. **Be empathetic**

   If people feel you are making an effort to understand their expectations and point of view, they will trust you more.

Minimizing difficult behaviours

Sometimes nice people can behave badly. Difficult behaviour can have a negative effect on meetings and make your job more challenging. There are some things you can do to promote helpful behaviour and dissuade annoying behaviour.

1. **Have a facilitator run meetings**

   The facilitator should explain the meeting process to everyone and should "take charge" of the meeting process so people can work together to achieve results. The facilitator is the only person in the room who has permission to do what might be interpreted as some rude things, such as interrupt people or directly tell them to sit down.

   Some things facilitators (or moderators, or chairpersons) must do:

   - Stop blame or personal attacks immediately. The facilitator can begin by encouraging people to express their own point of view, but not to speak about the opinions or approaches of others.
   - Ensure everyone gets airtime. Sometimes, a few people will dominate the speaking time available, while others sit back feeling annoyed. The facilitator should directly ask "quiet" people for an opinion, and should ask those who dominate to allow time for others to speak.
   - Stop emotional speechmaking. Occasionally, people mistake a public input meeting for Speaker's Corner. They launch into an emotional speech that is a thinly disguised attempt to raise applause from the "audience." The facilitator should interrupt such a speech and ask everyone to focus on the decision at hand.
   - Do not allow implied threats. Very rarely, people will imply threats to others in their zeal to make their point. The facilitator must admonish the person immediately for any implication of threat and, if necessary, should ask the person to leave the meeting.

Resource 8: Guide for facilitators and recorders

2. **Be a good host**

   Your efforts to make contact with people and help them feel comfortable at the meeting are very important. Most disagreeable behaviour is a result of fear or anxiety which is greatly lessened when people are politely welcomed.

3. **Encourage productive behaviours**

   In some cases, it is helpful to post a list of helpful behaviours before a meeting gets underway. In other cases, it is important to verbally state what behaviours will be helpful.

4. **Build common ground**

   People often agree about "what" needs to be achieved, but tend to disagree about "how" to achieve it. If the initial focus is on building a shared commitment to outcomes and empathetic discussion of people's concerns, there is much less emotion.

5. **Keep a "service attitude" but remain assertive**

   Your efforts to provide service to people will help them relax and be productive. However, occasionally there will be a person who mistakenly assumes you are being submissive. When people make unreasonable demands or too many demands, it is best to politely but firmly inform them how they can solve their problem without your involvement.

Conflict and consensus

Although "conflict" sounds like a bad thing, it is a normal and desirable part of the discussion process. You wouldn't be going to all this trouble if you were sure everyone agreed about everything. Good ideas come from the exchange of different points of view. However, you are trying to avoid emotional outbreaks and accusations (see the previous section about "minimizing difficult behaviours" on page 2-27).

Tip: Emotional confrontation at meetings often results from fear or anxiety. Help people stay calm and reduce the threat they feel—give them back some control.

Building consensus:

While "consensus" is not always achieved, it is always the ideal outcome of public input. Ideally, everyone either supports the decision or is not vocally opposed. Commonly, people are willing to drop their opposition, if certain mitigations, controls or compensations can be assured.

Here are the common requirements for building consensus among a group that initially expresses conflicting expectations:

1. Have some method to test the level of agreement. You cannot assume persons making speeches at a meeting represent the whole. Often, there is more agreement in the room than the speeches would suggest. Use some means to find out how many people support option A, B, or C.
2. Ensure people understand and agree to the outcomes ("what"), before they discuss the options ("how").
3. Ensure the range of options being described is complete and well described. NEVER suggest there is only **one** option—(i.e. take it or leave it).
4. Have people describe the criteria or conditions that affect their level of support for an option (e.g. level of traffic noise, preservation of trees, access to facility). It is much more productive for people to talk about why they are concerned or enthusiastic than for them to "take positions" for or against ideas.
5. Test the level of support for each option. Encourage people to express "conditional support" (i.e. I could support the option if I could be assured a proper fence will be erected so we don't have to look directly at the pump).
6. Seek combinations of options or modifications to options that could gain more support. Ask people in the room to help you find the best option—remind them there is no "perfect" option.
7. Test the revised option(s) to determine the level of support. Note the level of consensus or diversity that exists at this point. Note any concerns and find out what mitigations, or accommodations would be the best response to the concerns.

Conflict resolution:

If there is obvious conflict in the room, leading toward emotional disagreement, you must intervene to prevent the argument from becoming the focus of the discussion. Here are some suggested steps:

- Acknowledge the difference of opinion. Find out more about the needs or perceptions that lead to a difference.
- Ask for suggestions about how to address the conflict. Let the combatants present ideas about possible ways to reach common ground. Describe the conflict to the entire group and offer suggestions about how the conflict could be addressed. If you are at an impasse, suggest a separate meeting with those who are in disagreement.
- Expect to allow for venting (if people get angry, they may be accusative before they get to the point they want to make).
- Take a break if necessary. Allow everyone some time to consider what they have heard. Speak to the main proponents of the argument to determine what they see as the best way to resolve the emerging argument. Remember, stress is a major contributor so your efforts to reduce stress levels are valuable.
- If the parties cannot reach agreement on their own, suggest a mediation process. In this process, the parties work with a mediator in a concerted attempt to reach agreement (Municipal Affairs can help you with this process and suggest mediators).

Conflicts arise during digital engagement, too. The tips in this chapter also apply to handling difficult behaviours on the internet. However, for some specific considerations, please see Section 3, page 3-11.

9. Following through

Closing the loop

Never underestimate the amount of work you will have to do after the meetings are over and response forms are submitted. Take the time to congratulate your team on what they have achieved, but don't lose momentum. Here are some tasks that typically require your attention after the input is received:

- Thank those who have helped you, both online and offline.
- Keep any promises made; do you need to send out any information?
- Collect and inventory all notes and input in one place.
- Ensure all input received is analyzed and summarized. (This may require some time editing and refining notes.)
- Brief the project team as soon as possible and inform those responsible for the project of any concerns that might affect their planning, design or implementation.
- Review and summarize evaluations. Document any advice for future meetings. If appropriate, you can post the input summary on your website.
- Brief elected officials about the public input process and the advice received.
- Report back to those who have taken the time to participate. This may take the form of an email update, newsletter, and or social media status update. Make sure that they can see the input that the municipality has received.
- Connect the decision to the input. In your report to the participants, note where the decision is a direct response to the input received. Explain why, if the decision does not reflect the majority preferences of participants. Do not assume that people will connect their input to the decision. Be prepared to explain why some ideas could not be supported by Council.
- Write or redraft reports as necessary. It is often advisable to verify that you have interpreted the public input correctly. This means some (or all) participants have the opportunity to review your draft to verify it is accurate.
- Update your website and social media accounts to show the current stage in the process, decisions made, and upcoming opportunities to provide input. Also, don't forget to upload new or updated reports.

People must be informed about the decision and about how their input was used as part of the decision. If Council chose an approach different than many citizens recommended, it is essential that citizens are informed why another option was chosen.

Section 3

Using Digital Engagement for Public Input

SECTION 3

Using Digital Engagement for Public Input

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SECTION 3

Using Digital Engagement for Public Input

1. Introduction

What is digital engagement?

Digital engagement means using electronic communication tools to expand and strengthen the relationship between governments and the public. Digital engagement tools range from those as simple as the use of e-mail and websites, to 'social media', which includes Facebook, Twitter, and YouTube. Digital engagement enables any interested citizen to better understand and communicate with government. However, digital engagement does not replace traditional face-to-face engagement. Instead, digital engagement enhances the techniques you already use to engage your citizens.

Developing a 'digital engagement strategy' that makes use of social media tools can supplement your public input process to:

- Increase the audience for public engagement;
- Diversify beyond "the usual suspects" to engage hard-to-reach residents;
- Tap into existing community interests and social networks;
- Share information with and promote services to residents cost-effectively; and,
- Make government data more useful to the public.

Many Alberta municipalities are already using digital engagement tools to ask the public for their feedback, share up-to-date information, and build online communities that are involved in important civic issues. They join a growing group of local, provincial, and federal governments who are connecting with their residents and constituents online.

Previous sections in this Public Input Toolkit for Municipalities describe the motivations and techniques for public engagement with a focus on small and medium sized municipalities with limited budgets. This section of the Toolkit provides advice for municipalities just starting to consider the use of digital engagement tools and recommendations for municipalities that are already experimenting in this area.

NOTE: **If you encounter confusing digital engagement terms, please refer to the glossary at the end of this section for guidance.**

Getting started

Getting started with digital engagement is easy, no matter your level of capacity.

It is best to begin by building a business case seeking senior staff or council approval to supplement your public engagement strategy, or for initiating the use of social media in general. Build your rationale for using digital tools as part of your public input process. If you're lucky, leadership will already be open to the idea of digital engagement. However, it is likely that in the beginning you'll need to outline the opportunity, costs, similar projects, and specific goals for digital engagement.

The pages that follow provide you with the components to build your business case, and understand your options for proceeding with Digital Engagement, including:

- **Benefits** of digital engagement;
- Addressing the **barriers** to overcome;
- Assessing your **capacity** to engage digitally; and
- Understanding and choosing the right **tools.**

In this section, you will find:

- Tips and facts on the benefits of using digital engagement;
- Common fears and misconceptions around using digital tools;
- Information and resources on understanding and assessing your capacity for digital engagement;
- A brief technical overview of the most commonly used digital engagement tools; and
- How to choose the right tool for your organization's capacity.

Whether you are planning on enhancing your public engagement and communication by using digital tools, or using one tool to pilot for a public consultation project, the information that follows provides food for thought in moving forward with using digital engagement.

2. Benefits of digital engagement

Why should governments engage digitally?

More than 80% of Canadians are online,[2] with many people expecting government services to be accessible online. Digital engagement can help you meet that expectation as well as satisfy your own need to:

1. Increase engagement;
2. Diversify engagement;
3. Take advantage of existing community networks and interests;
4. Share information and promote services cost-effectively; and,
5. Make government data more useful to the public.

1. Increase engagement

Digital engagement can give the public a more interactive, fun, and informative way to participate in decision-making. Governments can use their online presence to ask their constituents for feedback, new ideas, spending priorities, and to host policy and issue discussions. Digital engagement can increase public understanding of decisions and foster potential support for ongoing implementation. Overall, digital engagement has the potential to reach a wider audience, connect with peer organizations, and raise more awareness about local government initiatives.

2. Diversify engagement

A key benefit of making government data and functions available online is engaging hard-to-reach people, and getting past the "usual suspects." A recent Ipsos Reid poll shows that **83% of Canadians are online**. Social networking sites are used by a wide range of individuals who are online, including those under 20, and older than 55. Digital engagement reaches a greater population because it allows busy people to engage at a time and place that is convenient for them. In other words, although people may be too busy to attend an open house, they may have time after work or before bed to log into Facebook. Digital engagement can be "squeezed in" between other commitments, and offers opportunities to access individuals with varying amounts of interest and time, which may increase participation.

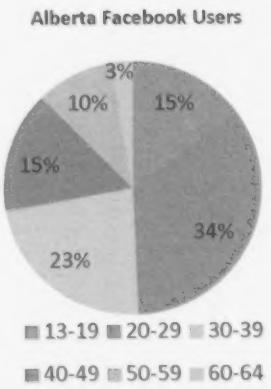

Figure 8: Facebook users by age in Alberta (Source: Facebook 2011)

Although social networking is most popular with people younger than 35 years old, 94% of new social networking profiles in 2010 came from users 35 years old and older (Ipsos Reid 2011).

30% of online Canadians go online while travelling from one place to another, most frequently with a smart phone (64%) or laptop (30%) (Ipsos Reid 2011).

[2] Ipsos Reid. 2011. *The Ipsos Canadian inter@ctive Reid Report: 2011 Fact Guide*. http://www.ipsos.ca/en/products-tools/media-content-technology/consumer-trends-product/canadian-interactive-reid-report.aspx

3. **Take advantage of existing community networks and interests**

   People may already be active on the issues facing your government, and moving part of your engagement online can tap into their existing knowledge, interests, and networks. Just as we will hold a public meeting or open house in the neighbourhood affected by government decisions, local governments can go to the virtual places where their constituents organize themselves and spend time.

65.9% of rural and rural remote Albertans (those who reside outside of the seven major urban centers) have access to broadband Internet (Service Alberta 2010).

4. **Share information and promote services cost effectively**

   As the newspaper industry changes and more constituents communicate online, local governments are turning to free online tools to profile their work and to directly interact with residents. Important services like safety alerts, local cultural events, service schedule changes and government announcements can be broadcast online with a smaller budget. With digital engagement, there is also the potential for messages to "go viral," reaching thousands of people with little effort.

5. **Make government data more useful to the public**

   Governments around the world are making data available for re-use. This "open data" approach advances the notion that citizens should be given the information and transparency required to hold government accountable. Besides transparency and accountability, open data has other benefits like innovative use of under-used data or improving relationships between government and partner organizations. Making data freely available in a useable format adds value for all residents.

The fastest growing group of Internet users in Canada in 2010 was the 55+ group (comScore 2011).

You can use these points to help gain Council approval for your digital engagement media strategy.

Strategies for building your business case

When building your business case, outline the benefits of using digital engagement. There are several strategies that will assist in strengthening your case.

1. **Present success stories**

   One of the best ways to educate council and colleagues about digital engagement is to find examples of other local governments who have used the tools, and present information on what they've learned and how it relates to your initiative.

2. **Show how easy digital engagement is**

   Consider arranging digital engagement demos during staff meetings or a one-on-one with a councillor. Host a brown bag lunch to discuss staff experiences and answer questions regarding digital engagement.

3. **Use clear results and examples**

   Some council members and senior managers may need hard numbers and measurable results to understand the benefit of digital engagement. In your briefings or presentations, show examples, facts with numbers attached, and "lessons learned" to ensure a productive conversation.

4. **Develop a shared understanding of scope**

   It's also useful to have an upfront understanding of what your municipality will and won't do online and who will be responsible for managing your messaging and responses before the project begins. Be sure to set up social media and digital engagement policies, clarify your Freedom of Information and Privacy (FOIP) terms and other key policies (see Resource 10: Terms of Use and Privacy Statements), and identify roles and responsibilities. Having clear policies and procedures will help both employees and the public be aware of the types of behaviour that are appropriate and the consequences for inappropriate action. The process of creating these policies can also lead to a deeper understanding of the benefits and value of digital engagement.

5. **Engage a senior manager to champion the project**

   While it's important to have staff with the technical know-how to implement a digital engagement strategy, it is equally important to have champions among

senior management. The champion is needed to convey the digital engagement strategy to the entire organization, create support and buy-in, and remove barriers. Without the champion, the strategy is likely to struggle with complacency and take longer to be implemented, or worse yet, it may be implemented but lack continued management, thus damaging your credibility online.

6. **Resource the strategy for the short and/or long term**

   Resources committed to a digital engagement strategy should match the term of the strategy, whether that involves a project a few months in duration or whether the strategy is part of the longer-term communications plan.

   Consider staff time required to carry out plans. If you are not sure whether to commit to a course of action, err on the side of caution. Remember that if you set an expectation that you will be engaging your public through certain digital tools, whether through a website, email account, Facebook Page, regular newsletter, or the like, you will damage your credibility if you allow those tools to become irrelevant. It's crucial that once you commit to a strategy, you maintain your online presence, so plan appropriately and be clear and realistic about the staff resources needed.

   In addition, implementing a digital engagement strategy may require specialized software (paid programs, etc.) or hardware (laptops, cameras, etc). Review all the tools available to you (see page 3-18) and budget accordingly.

   For a full listing of resource items to consider, see:

   Resource 2: Budget considerations for public engagement

7. **Educate the public on digital tools**

   In planning your digital engagement strategy, you may want to consider arranging education sessions for those in the community who may be interested in using the tools, but unsure of how. Sessions would attract a wider audience to engage digitally, and also provide an opportunity to promote your municipality's intended use of the tools.

Case Study: County of Stettler - *County's Breaking News*

In the beginning the Internet was a source of information, a static place where people could find things. Today society has embraced Web 2.0, a platform whereby users not only consume content but also participate in its creation. Web 2.0 puts the user in the driver's seat by offering the ability to post content in many forms such as, photos, video, and blogs.

In the County of Stettler, the participatory nature of digital media has facilitated a unique approach to sharing municipal news. "We produce videos that feature members of Council speaking to the results and items of our Council meetings," says Shawna Benson, Director of Communications for the County. "This has evolved to include members of our administration who share information on various projects we are undertaking," says Benson.

To make it happen, the municipality purchased a high definition camera, a tripod and editing software. Members of Council are briefed before the Council meeting with key agenda items and key messages. After the meeting, Councillors are interviewed and share their perspectives. The video is edited in-house through the IT department and then posted on Facebook and Twitter. "We also place it as a pop-up on our website so when people open the site they get the latest video right away," says Benson.

"We have taken the concept to our local school's multi-media program and have developed a partnership that has the students do some of the interviews during the school year," says Benson. Through this initiative the County has built a strong relationship with the schools, helping fulfill their local government curriculum in a unique way and increasing awareness of the role of the municipality in their community.

"Although we are still in the beginning stages of the project we have learned quite a bit. First, we purposefully shoot this low budget and somewhat unpolished because we are trying to build a relationship with the public and if it looks rehearsed they are going to be skeptical and more focused on what it costs than the content. Second, it provides a new way to share our stories with local media. They use the 2-minute videos to report on what is happening in the municipality. So, even though it takes about 5 hours of extra staff time each week we do find it to be a more efficient and effective way to share our stories with a broad audience", says Benson.

The County of Stettler has implemented a dynamic way to interact with their public, sharing points of view and connecting with the community by producing their own content. "We are using digital media to build better community relations, put a face to the organization and humanize local government," says Benson.

Shawna Benson can be reached at: sbenson@stettlercounty.ca

3. Addressing potential barriers in using digital engagement

Listen to understand your context of challenges

Understanding common digital engagement challenges and potential solutions is an important part of your digital engagement strategy. It will help explain the benefits of your strategy to council and staff, and ensure you are prepared for any potential pitfalls.

As you build your business case, start by speaking with your colleagues and have one-on-one discussions with councillors or managers to get feedback. Pitch your idea in an exploratory tone, asking for feedback in very early stages of the project. What's most important here is to listen! Take note of the perceptions and concerns of the people you talk to.

Next, interpret what you've heard from each conversation and identify the biggest concerns of everyone you spoke to. Remember that while council and senior staff may say, "It will cost too much," they could really mean "I don't understand what this is about." Your notes and listening skills will help you hear the difference. It helps to understand what key decision makers are excited about!

Your third step is to respond. Once you know what kind of resistance exists to the project, you can craft a response. Use your judgement about the right kind of format for your response, whether it is a briefing memo or invitation to look together at another municipality's web presence.

Common fears and misconceptions

There are a number of common beliefs surrounding online engagement, including fears about losing control of messages and not being able to manage online conversations.

Be realistic about what these approaches can accomplish. Explore both positive and negative perceptions and alternatives. In the early stages of digital engagement strategy development and implementation, there will be mistakes because you need to find out what works and what doesn't for your government. Learning is part of the process.

To pave the way to successful adoption, use your business case to discuss the challenges as you explain the benefits of digital engagement to senior staff and council:

"Staff will waste time and be distracted"

Social media is sometimes perceived as "fun" or "not work," and therefore perceived as a waste of time. Historically, so were the telephone and email! In reality, social media improves connections both within an organization and between the organization and the public.

Not only can digital engagement improve productivity, but it can also save resources in marketing and communication. Your IT department or contact person may be able to help you initiate "silent monitoring," which flags the amount of time spent on online tools.

"Social media is trendy and will go away if we wait long enough"

Social media and digital engagement tools are revolutionizing the way people communicate. While we will be using new tools and formats in five years, the value of these tools is in their responsiveness and the personalized experience.

"Digital engagement is too time-consuming and resource-intensive"

Digital engagement can reduce costs, build stronger relationships with the public, and make residents more aware of local governments' positive impact in a community.

Other benefits include increased public involvement, better connectivity between employees, real-time information exchange and collaboration, and improved knowledge transfer.

"What if they aren't using the tools?"

It is important to choose the appropriate tools that are relevant to your target audience, and that can be appropriately managed within your capacity (see next section for further information). However, in planning your digital engagement strategy, you may want to consider arranging education sessions for those in the community who may be interested in using the tools, but unsure of how. This would attract a wider audience to engage digitally, and also give you an opportunity to promote your municipality's intended use of the tools.

Keep in mind that unequal access to computer hardware and high speed internet can leave out some socio-economic groups. However, the increase of internet access on mobile phones is providing basic Internet access to a wider range of geographic locations. The Alberta government has initiated a program to achieve high speed access for 98% of Albertans. So, although the perception remains that rural Albertans lack access to high-speed internet, the reality is changing.

"What if no one participates?"

It is time to start a conversation! Use your listening tools (pg. 3-17) to find people and influencers within your jurisdiction. What does your audience care about? Does something that your target audience cares about relate to local government? Is there a good way to get that conversation started?

What are other people saying? Are there conversations going on in other communities that could apply in yours? How will you get that conversation started?

Ninety percent of website users never contribute comments or content to the site. Remember this large and quiet audience when developing your engagement strategies, because they are reading your messages even though you don't hear from them. Only 1% of a website's users, the influencers, account for almost all of the activity on that site.[3]

"What if we get poor quality and/or inaccurate input?"

Some people believe that the internet is a place where the quality and accuracy of information can't be guaranteed. However, digital engagement benefits from "the wisdom of crowds," which is based on the idea that many people are smarter than just one person. Studies have shown that Wikipedia is more accurate than published encyclopaedias.

The key is to have a procedure for managing and correcting incorrect information, while citing official sources as appropriate.

"What if senior staff become too accessible, having to deal with requests or customer service normally handled by other employees?"

Senior staff do not automatically become accessible just because the organization is using social media. They can choose for themselves how much they would like to engage. The key to handling this is to have protocols or codes of conduct for managing the process.

There are three ways senior staff can choose to participate in digital engagement. You can:

- Advise senior staff not to connect their Facebook, Twitter, etc. accounts (if they have them) with the official organizational accounts;
- Set up accounts for senior staff, but let junior staff ghost-write content within a set of parameters (if approved by senior staff); and
- Encourage senior staff to create their own accounts and participate in the conversation.

[3] Nielsen, Jakob. 2006. Participation Inequality: Encouraging more users to contribute. Jakob Nielsen's Alertbox, October 9. <http://www.useit.com/alertbox/participation_inequality.html>

"Digital engagement is too difficult to do with Freedom of Information and Privacy regulations"

Freedom of Information and Privacy statements are important, because they describe data retention policies and practices, as well as security considerations, to your users.

Freedom of Information and Privacy regulations can be addressed by setting up some good general practices, including:

- Protecting confidential and proprietary information when needed;
- Differentiating between soliciting input (files need to be maintained) and responding to public inquiry (no need to keep record). Have a mechanism to record data.

"I can't access digital engagement tools at work because they are blocked"

If your municipality has a (formal or informal) policy that restricts access to the use of some digital tools, approach your IT department or the person responsible for IT, and ask if it is possible to get user-level or "granular" firewall privileges. This allows some people access to digital engagement tools, but not everyone, if there is a current policy or firewalls that restrict global accessibility of the tools.

"What if people say bad things about us?" or "It is too difficult to moderate online conversations"

Negative comments are bound to arise in any engagement activity, both online and in person, and people are probably already talking about your organization on the internet. Rather than let them dominate the conversation, you can frame the issues and change the nature of the conversation online.

The key to managing negative comments is to have a procedure for finding them and for dealing with them. General principles for dealing with negative comments are:

- **Transparency** – Be clear about your professional affiliation and disclose any conflicts of interest.
- **Accountability** – Make reference to and cite your resources.
- **Professionalism** – Keep the tone professional while maintaining a more casual style that is appropriate to the internet.
- **Balancing time with influence** – Given that you have limited time to engage with your audience, prioritize those who have the most influence online.

- **Recording negative comments** – it is important to save (i.e. by screen shots) negative comments along with any official responses to the comments.

Be clear from the outset about the expectations for online behaviour (e.g., code of conduct) and have a plan in place to ensure respectful online discussions. You may wish to develop varying responses to use if necessary, according to the severity or number of infringements. By setting clear and transparent ground rules, actions you may need to take to ensure proper behaviour will be justified and consistent.

Be aware that controversial or "off topic" issues can overtake or hijack digital engagement. Be sure to keep listening to what your constituents are saying, remind participants about the purpose of the engagement, if necessary, and have a clear moderation policy to apply when needed.

The best way to manage difficult behaviours online is to be prepared with a plan for addressing certain situations. Many municipalities have written "terms of use" statements for the public, "privacy statements" for their website users, and internal policy statements to guide employee use of online resources. Rather than reinvent the wheel, you can use these existing policies as a guide to create your own.

Resource 10: Terms of use and privacy statements

Sometimes action is required for negative or imbalanced comments. Most often this action involves listening to the person's core grievances and finding a way to address them, whether by correcting factual errors, or improving customer service and making up for a bad experience. At other times, especially where someone is posting a rant or a joke, the best course of action may be to keep monitoring the situation but to avoid responding and allow the conversation to unfold. The online group may self-monitor.

Consider if the community will participate in flagging infractions or if a staff member will be responsible. If you do remove a post, take a screen shot, date it, describe why you removed it, and file it.

Case Study: Okotoks *Preparing for the Good and Bad*

Municipalities are offering more opportunities for the public to comment and share online. Facebook, Twitter, YouTube and websites are popular tools for governments looking to engage. Implementing digital media opens the formation of online groups or communities. As with any new group there is a period of time in which norms are developed telling group members what they can and cannot do. As creators of these new group spaces, what role do municipalities have in regulating online group norms?

"Without question one of the main concerns of any municipality when considering Facebook or Twitter is how to deal with negative comments," says Melanie Heemeryck, Communications Specialist with the Town of Okotoks. In face-to-face interaction, norms are developed implicitly over time, through observation. The lack of "awareness and presence" cues in many digital media environments inhibits observation of other people's behaviors and hinders the process of norm formation. So, how can municipalities handle negative comments through digital media tools?

"We have a disclaimer on our Facebook and Twitter saying what will be done about inappropriate comments that are derogatory or defamatory. We do get a few members of the public that consistently post complaints or provide negative feedback, and everyone can see these comments," says Heemeryck.

In an online environment, the actions of the participants are visible to the entire participating group. "What we have found is that the group kind of regulates itself. The fact that people can see what others are posting seems to make them more accountable so we have not had too many issues to deal with and, when we have had an issue the disclaimer gives us the ability to remove the post," says Heemeryck.

Having a way of dealing with negative comments is an important part of any engagement activity whether in person or online. Establishing a disclaimer and process for responding has enabled Okotoks to address potential issues in a consistent, professional manner and foster a more positive digital environment for all participants.

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4. Your municipal capacity

Matching capacity with need

Each municipality has differing internal and external capacity for digital engagement. Internal capacity includes having staff time, resources and senior staff support to try online consultation tools. External capacity includes council and public support for engagement online, as well as access to the internet.

To help you self-assess whether your local government has low, medium, or high capacity for digital engagement:

See Resource 9: Evaluating capacity for digital engagement

Tip: Start small and learn as you go.

What small project can you implement first as a pilot? The secret to success with digital engagement is careful, low-risk experimentation. Design your initial experiments around trying out the tools and techniques.

Recognize lessons learned from each experiment and then apply them to your next project. If you identify some learning objectives at the beginning, it is easier to see what works.

Low capacity

Municipalities with **low capacity** for digital engagement have less internal and external capacity. A low capacity municipality may have little support from senior staff and council for digital engagement, limited budget and staff resources to use digital tools, a constituency with limited online access, and a large number of internet-related functions (like website and networking maintenance) contracted out.

If the results of Resource 9: Evaluating Capacity for Digital Engagement indicate that your municipality has low capacity for digital engagement, your municipality may find it helpful to use quick, easy, and inexpensive digital engagement tools. However if members of your community spend little time online, you may wish to consider whether digital engagement will serve your constituency well.

Using low capacity tools really well can help you as you move to medium capacity, and there are many ways to do so. If you have contracted out technological functions, such as website maintenance, you may choose to build a new website with a content management system so any staff member can update content. Or, when you hire new staff, you may look for candidates with digital engagement experience and build those roles into their work description.

Medium capacity

A **medium capacity** digital engagement community has mixed internal and external capacity. Compared to a low capacity municipality, a medium capacity community has greater access to high speed internet, more staff resources, and a higher level of senior staff and council support. Overall, a medium capacity municipality has budget and staff time and ability to try out more complex tools.

If the results of Resource 9 indicate that your municipality has medium capacity for digital engagement, a very well executed and maintained website is a top priority. You may also wish to try photo sharing, online surveys, online meetings, blogging, or any other free and easy-to-use online tool. Even though they require more resources than "low capacity" tools, these tools have benefits that can be clearly communicated to council, senior staff, and the public. However, as with low capacity tools, take care not to invest in online tools that your community isn't likely to use.

To move to high capacity, try writing digital engagement activities into staff duties and hiring staff with a high level of knowledge of online tools. As you move into high capacity, consider budgeting for some paid tools when planning a level 3 public input process or during an annual budget review.

High capacity

A municipality with **high capacity** for digital engagement has high internal and external capacity. Community members have high-speed internet access and regularly use Facebook, Twitter, YouTube and other online sites that you may use for engagement. Council and/or senior staff support online public consultation. Also, the municipality has access to high-speed internet and has staff time and knowledge to undertake a digital engagement process. Finally, staff in a municipality with high capacity can easily access Facebook, Twitter, and Google products from work.

If the results of Resource 9 indicate that your municipality has high capacity for digital engagement, you may wish to try paid or custom online tools. Many of these more advanced tools are especially suited for level 3 public input processes, as well as analyzing public input from digital engagement.

Case Study: Saddle Hills *Digital Engagement – Are we ready?*

A rural municipality in the Central Peace region, Saddle Hills County takes pride in the fact that attendance rates at public meetings are quite reasonable for its rural setting. "Development is the primary reason we consult the public. These important issues warrant an opportunity for public sharing through things like open houses," says Chief Administrative Officer Dianne Nellis.

So, for municipalities with such a good response for in person meetings, do digital media tools have a role in public engagement activities? "We know that using our website or having a Facebook account won't replace what we already do, but these tools offer a way to communicate faster, and people can respond anytime, anywhere," says Nellis. In today's digital age the question isn't whether technology has a role but what do organizations need to think about when contemplating implementation?

"It's about whether our ratepayers would use these tools," says Nellis. The municipality recognizes that not all residents may use the technology or even have access to highspeed internet. Surveying community use to determine who is using the technology, for what purpose, how often, when and where would be a critical first step in exploring the potential application of digital engagement.

Additionally, the interactive nature of digital media requires municipalities to consider their internal capacity for implementation. "Staffing would be a starting point. The role requires someone who can not only share information but also interact, providing responses to questions or concerns. A knowledge of the organization, or at the very least knowing who to ask, would be important," says Nellis.

At Saddle Hills County office employees do not have access to social media tools. "Currently our staff are not permitted to use social media at work. We would need to devise a policy that would allow staff to use it as long as it relates to their work," says Nellis. Clearly identifying the role of social media within the organization and articulating who is responsible would be another key consideration for implementation of digital engagement.

At a time when municipalities hear so often that they "need" to engage their public through things like Facebook and Twitter, Saddle Hills provides a good example of what organizations should think about before delving into digital engagement. Emphasis on target audience characteristics, accessibility, resource and policy implications will help determine if digital media tools will aid or enhance a municipality's public engagement goals.

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5. The right digital tools for the process

Choosing the right digital tools for your public input process doesn't have to be an overwhelming experience . This section will walk you through the steps to choosing the right tools. First, start by getting to know what others are saying about your community and what tools are being used by your potential audience. Then, you will learn about the most commonly-used digital tools, before exploring how a wide variety of digital and social media tools match various levels of municipal capacity and desired public input.

For some questions to consider before choosing your tools, see:

Resource 11: Choosing digital engagement tools (worksheet)

Listening to what is already being said

Now that you've built the foundation of your business plan for digital engagement and you have a better understanding of your municipality's capacity for digital engagement, it's time to see what is already being said online about your municipality. This stage will give you a better understanding of the online branding or reputation your municipality has already acquired, and it will also help you select the tools that suit your public input process.

A little "listening" can go a long way. Remember, even though your municipality may not be actively engaged in digital tools and social media, it is likely that others have already posted pictures, videos, and messages that reference your community. It's important that you take a look at the content that already exists to understand your starting point, and this may prompt you to develop a wider communications strategy to develop and promote your own branding and messages.

There are a number of tools that can help you figure out your community's online branding presence, and these range in complexity from simple searches to more involved automatic updates that need setup.

Simple tools for listening

As a first step, conduct simple searches for your municipality on popular search engines and social media sites like YouTube:

Tool	Purpose and Common Uses	Pros and Cons
Google (or other search engines like Bing and Yahoo)	▪ Use the search function to enter key words and view the types of text, images, and videos that are posted about your municipality	▪ **Pro:** Free and easily accessible ▪ **Con:** Depending on the name of your municipality, the search terms may return irrelevant web content

Tool	Purpose and Common Uses	Pros and Cons
Social Mention	▪ Use the search function to enter key words and view the context of remarks posted about your municipality through various social media tools	▪ **Pro:** Free and easily accessible. Option for automatic updates delivered to you. ▪ **Con:** Search terms may need updating and refining over time.

Note: If your community has a newspaper with a website where readers can leave comments, it may be useful to see what people are saying about articles that discuss community issues.

Other tools for listening

If you'd like to invest a bit more time, there are a number of other tools that can be set up to provide you with ongoing information about the types of content posted about your municipality. These examples of common digital tools are listed for your consideration, if appropriate:

Tool	Purpose and Common Uses	Pros and Cons
Google Alerts	▪ Choose keywords that describe your municipality and/or current projects ▪ Google automatically emails you when it locates new content with your chosen keywords	▪ **Pro:** Free and fully automated ▪ **Con:** Search terms may become irrelevant over time and need updating
Really Simple Syndication (RSS) Feeds (Google Reader, Yahoo Pipes)	▪ Receive updates from news sources, blogs, and social networking sites ▪ Review updates using an RSS reader, such as Google Reader	▪ **Pro:** Free and fully automated ▪ **Con:** Often blogs and news updates contain articles not relevant to your search
TweetDeck, Hoot Suite, Seesmic	▪ Software applications that consolidate social media accounts across Twitter, Facebook, WordPress, LinkedIn, Flickr, etc.	▪ **Pro:** Search many social networks for key words ▪ **Con:** Not automated
Paid Suites, (Radian 6, Sysomos, Alterian SM2)	▪ Complete platform to listen, measure and engage with the public across blogs, forums, social networking sites, wikis, and photo/video sharing sites	▪ **Pro:** Effortless way to monitor entire social web ▪ **Con:** Expensive. Upwards of $600/month
Topsy	▪ Tracks content across the Twitterverse and is a good way to find influential Twitter users	▪ **Pro:** Monitor tweets, free. ▪ **Con:** Not automated.

Understanding your audience

Researching what is being said about your municipality online not only helps you understand the types of messages and branding available about your municipality, but it also gives you an insight into the types of tools and social media sites used by your citizens. Knowing whether or not your target audience already uses a tool can help ensure that your digital engagement process will be successful.

Commonly-used digital tools

There are a lot of digital tools to choose from when contemplating an online engagement strategy or when using a specific tool during a public input project. Some you've heard of, others may leave you scratching your head. Before diving into that longer list, it may be a sanity-saver to start with some of the most commonly-used tools which you may be already familiar with. These tools include:

- Websites
- Email and Newsletters
- Facebook
- Twitter
- YouTube (video) and Flickr (images)

Websites

Your website is your online business card, phone directory, organizational brochure, and help desk. Websites are the primary place online where people go to find out more information about your organization. They are thus the foundation of your digital engagement strategy, and all other digital and social media tools should drive traffic back to your website.

Common Uses	Capacity and Effort	Pros and Cons
▪ Describe your organization and services, who to contact, bylaws, current events, council agendas/ minutes, etc. ▪ Other social media tools should direct the public to visit the website for more information	▪ Low capacity, medium effort	▪ **Pro:** Provides basic information easily ▪ **Con:** Needs to be updated regularly, mostly one-way information exchange

Best practices for municipal websites include:

- **Update content regularly!** Since the website is often the primary source of online information on your municipality, it's important to keep the information up-to-date and relevant to your public. Your online credibility will be negatively impacted if the last update was done in 2008 and the content references old events.

- **Match the complexity of your website to your capacity**. It's better to have an up-to-date but simple website that provides relevant content, than to create a website that requires too much time and effort to update and which could be forgotten for lack of resources.
- **Organize information by service areas** rather than by departments (such as "City Services," "Doing Business," "Living Here") and include a contact person's email address and/or phone number.
- **Offer online access** to: council schedules, minutes, and agendas; councillor bios, photos, and contact information; bylaws; and, advisory committee membership, meeting schedules, agendas and minutes. The goal is to make it easy for residents to find out when public meetings are, what meetings are about, and who to contact.
- **Link to social media accounts** if your organization has them. Use social media tools to drive online traffic to your website for more information.
- **Showcase local news and events**, making it easy for your readers to share them via social media and subscribe to updates by email or RSS.

If you don't already have a municipal website, building a WordPress site could be a simple way to get started. WordPress is a content management system (CMS) that allows people with very basic technical skills to update the website, and includes "plugins" and "widgets"(small internet applications) that can integrate with Facebook, Twitter, YouTube, and other social websites. WordPress is open source software (non-proprietary and made by many people), so there are many resources available online. The best place to look is the WordPress Codex. ThemeForest and other services sell inexpensive WordPress themes, so you can easily create an attractive website.

If you already have a website, you may be able to ask your IT department or contact person or website contractor if they can:

- Create a contact form for general inquiries and/or put email addresses for people to contact in your service areas.
- Create links to your municipality's Facebook, Twitter, and/or YouTube pages if you have them.
- Make an RSS feed of latest news or service updates from your website.

Email and E-newsletters

Email and electronic newsletters (e-newsletters) are one of the least expensive and easiest ways to keep in touch with your public. While email is a regular part of municipal business, e-newsletters are simple to implement, are less expensive than direct mail by saving printing and paper, and reach a specific audience that is interested in receiving your message.

Common Uses	Capacity and Effort	Pros and Cons
▪ Contact people (or be accessible) over the internet ▪ Updates about municipal events, planning processes, opportunities for input, changes in service, contests, volunteer opportunities, and new initiatives	▪ Low capacity, low effort	▪ **Pro:** Reaches residents quicker than mail and is very inexpensive. You are accessible to your audience. ▪ **Con:** Residents voluntarily give you their email addresses for a specific purpose. Email may get flagged as spam. No real opportunity for interaction.

MailChimp and **Constant Contact** are examples of online tools that can help you create attractive email newsletters and evaluate how effective your newsletters are. These tools are useful because they help prevent your newsletters from getting caught in spam filters and they handle unsubscribe requests automatically. Furthermore, these tools can show you how effective your emails are by giving you statistics on the percent of recipients who opened your emails. These tools have online tutorials on their websites.

Best practices for email and e-newsletters:

- **Respond to emails within 24 hours**. Even if you don't have the answer to their question or concern right away, thank the contributors for their email and let them know when to expect an email response.
- **Collect email addresses** through your website and at municipal events, and **manage emails using distribution lists**. When collecting emails, be specific about their intended use and create different distribution lists for different purposes.
- **Keep email addresses in confidence** and never use emails for purposes other than those approved by email address owners.
- **Never let length trump substance**. You will build more credibility for your e-newsletter if it provides useful, relevant content rather than a long list of things with questionable interest to your public.

- **Send e-newsletters sparingly** to avoid overloading your audience with emails. Consider semi-monthly, monthly, or quarterly updates for different purposes.
- **Mirror the content from your newsletter on your website**. The newsletter should never provide more information than is found on your website. As with other digital and social media tools, it's usefulness lies in highlighting particular items and driving traffic back to the website for more information.
- **Provide an 'unsubscribe' feature at the bottom of newsletters**. This could be as simple as listing an email address so that people can request to remove themselves from your distribution list.
- **Incorporate your visual branding**, if available. If your municipality has a logo, corporate colours, or other design features that create a unique visual branding (much like your website), include those elements into your newsletters.

Facebook

Facebook is one of the world's largest social media platforms. The benefit of Facebook is that the information reaches users in real-time without users needing to actively visit your municipal website. In addition, Facebook also provides a forum for citizens to post their own content, reply to questions, voice concerns, discuss issues, and share information with their friends—at no cost to the municipality.

Common Uses	Capacity and Purpose	Pros and Cons
▪ Social networking service that brings together people who know each other in real life and/or have shared interests. ▪ Local governments tend to use Facebook pages for customer service and/or for hosting polls and discussions about a project	▪ Low capacity, low effort	▪ Pro: Provides basic information easily and allows for conversations to develop ▪ Con: Needs to be updated regularly

While people make Facebook profiles, organizations and municipalities make Facebook pages. A Facebook page allows public users to become "fans" and follow what is posted on your page, similar to someone subscribing to a newsletter. However, there are no distribution lists and fans can leave their own messages on your "wall" (a type of message board on your Facebook page). Municipalities can use Facebook pages as a sort of dynamic newsletter where you can post concrete information about programs and services, community events, and other information that would be available on the municipal website.

Here are a few basic terms and items to monitor on your Facebook Page:

Half of Canadians have a Facebook (est. 2004) account, including 1.9 million in Alberta, half of which log in on any given day.

The average Facebook user spends over 15 hours on Facebook each month, has 130 friends, is connected to 80 community pages/groups/events, and creates 90 pieces of content (links, news stories, blog posts, notes, photo albums, etc) each month.

This means Albertan Facebook users are potential active participants of your digital engagement efforts.

- **Wall Posts**: If someone "Likes" your page, he or she can post content to your wall. Because fans can say anything, it is important to both monitor what people say and have a procedure for managing certain kinds of input.
- **Comments**: Both you and your fans can comment on Facebook, whether they be comments on a wall post, photographs, or other content. Comments are a conversation about something.
- **Likes**: When someone "Likes" a wall post, this means they like or agree with the content of that post.

It is important to encourage fans to post on your wall, write comments, and like your posts because all of those activities show up on their "News Feed" on their own Facebook profile, which means that people in their social network can also see the posts and are encouraged to participate too.

Best practices for Facebook, as documented from research performed by *Buddy Media* and *Virtue*:

- **Keep your posts short and sweet.** Posts with 80 characters or less had almost 1/3 more user engagement
- **Use images:** Photos are far more engaging than videos, and both receive more views than just text.
- **Don't use URL Shorteners on Facebook:** Users were three times as likely to be engaged with a post that used a full-length URL.
- **Consider posting updates when your community is most active on Facebook:** While some people check Facebook during work, people are more likely to check it during breakfast, a morning commute, after work, or before bed. People are less likely to check Facebook on weekends, though.
- **Try posting on different days of the week:** Buddy Media found that engagement with posts spiked on Thursdays and Fridays.
- **Ask a question at the end of your post:** Posts that end in a question have a 15% higher engagement rate.
- **Ask easy, interrogative questions:** Easy to answer questions, like "where," "when," "would," and "should" elicit more responses, especially because people are likely to answer yes/no questions with a "Like." "Why" questions elicit the lowest response.

Tip: Invite a few people in your organization to have administration privileges on your municipality's Facebook Page. This way, if someone leaves your organization, the other Page administrators can remove that person's access to the Page, which is more secure than many people using a shared password.

Tip: If staff use their Facebook account to create and administer a Facebook Page, you may consider creating policies that guide appropriate staff use of social media sites. Although the identities of Page administrators are hidden on Pages, someone could accidentally post from their own account.

Furthermore, regardless of whether staff members use Facebook for work, they may post unprofessional content on their personal Facebook accounts that may one day become public. It is important for all employees to realize that once something is on the internet its privacy cannot be guaranteed.

- **Be direct when asking for feedback:** When asking readers to give feedback on a post, use simple language that is already used on Facebook. For example:
  - "Like our…"
  - "Post your favourite…"
  - "Comment on…"
  - "Tell us about…"

For additional technical information on Facebook and other digital tools, see:

Resource 12: Additional digital tool "how-to"s

Twitter

Twitter (est. 2006) is an exponentially growing micro-blog site. Although the site releases few statistics, with even fewer being available about Canadian or Alberta Twitter users, the Twitter Blog recently posted examples of the site's tremendous growth. In February 2010, people sent 50 million tweets a day. In March 2011, people sent 140 million tweets a day. Twitter has on average 460,000 new accounts per day as of February 2011.

Twitter is a social networking and microblogging service that allows you to send short text messages 140 characters in length, called "tweets", to your friends, or 'followers.' Municipalities can use this tool to provide updates on new initiatives, promote events, send emergency alerts, and generally post short messages that can be instantly available to those who subscribe to, or 'follow', what you have to say. Twitter can also be used by people in your municipality to communicate directly with the public, though this use is outside the scope presented below.

Common Uses	Capacity and Effort	Pros and Cons
▪ Brief (140 characters) status updates available online and through text messaging that share ideas, reflect on a topic, or ask a question ▪ Post information on events, find out what people are saying about a topic, share an update about a service change	▪ Low capacity, medium effort	▪ Pro: Reaches many people with little effort, open and transparent, connects to communities of interest ▪ Con: Needs to be updated regularly, communications staff need broad authorization to engage with the public

Twitter users generally engage in 4 activities:

- Providing updates and creating content;
- Following relevant people and organizations;
- Sharing other people's content on Twitter through retweets (re-posting other's messages); and
- Engaging readers by answering queries (customer service), posing questions, and commenting on discussions about a topic.

Best practices for Twitter include:

- **Engage your audience and communicate short, simple thoughts**. Since tweets are limited to 140 characters, ask questions, share links and tips, and get to the point!
- **Give your municipality a friendly and approachable feel** through good Twitter-based customer service that is informal and quick.
- **Link back to your website!** Since your tweet is very short, use Twitter to send followers a clincher that directs them back to your municipal website. Find out how to shorten website addresses, or URLs, in Resource 12.
- **Mention users by name** to engage them in the conversation (using @ in front of their user name).
- **Tweet often!** HubSpot, an online marketing company, states that people tweet 4.4 times per day on average. People who tweet between 10 and 50 times a day have the most followers, with 22 tweets being optimal.[4] The reason why is because tweets "decay" incredibly fast – 92% of all retweets and 97% of all replies occur within an hour of the original tweet.[5]

For additional technical information on Twitter and other digital tools, see:

Resource 12: Additional digital tool "how-to"s

Tip: Twitter's interface is easy to use, but if you are managing multiple accounts you may find it easier to use HootSuite or TweetDeck. You can also examine hashtag trends at hashtag.org, Twitterfall, Monitter, and hashtagify.me.

Did you know that you can also update Twitter and receive messages by text message (SMS)? After you link your mobile number to Twitter through your settings, just send tweets to 21212

[4] Zarrella, Dan. 2009. "Is 22 Tweets-Per-Day the Optimum?" *HubSpot Blog*. 2 March. http://blog.hubspot.com/blog/tabid/6307/bid/4594/Is-22-Tweets-Per-Day-the-Optimum.aspx

[5] Sysomos. 2010. "Replies and Retweets on Twitter." *Sysomos Resource Library*. September. http://www.sysomos.com/insidetwitter/engagement/

YouTube is the most popular video website in Canada, with more than 2 billion videos being viewed in December 2010. The top Canadian video provider, CTV, was an order of magnitude lower with 2.7 million unique viewers in the same period. The largest segment of online video viewers was people over the age of 35.

YouTube / Flickr

YouTube and Flickr are video and image sharing websites, respectively, which allow users to upload content to the internet for easy storage and viewing. Municipalities can upload videos and images to their own YouTube and Flikr accounts, then link to the image and video files directly from their municipal websites without using their own server space.

Common Uses	Capacity and Effort	Pros and Cons
▪ Media sharing sites like YouTube and Flickr can help you share your photos and videos without incurring expensive bandwidth charges with your internet provider ▪ Used to showcase local events or municipal services as well as ask for community submissions	▪ Flickr: medium capacity, low effort ▪ YouTube: high capacity, high effort	▪ **Pro:** Fun and engaging. Can solicit photos and videos from the public, too. ▪ **Con:** Online videos can be resource-intensive to edit and upload, may require permission from people featured in photos and videos

Best practices for YouTube and Flickr include:

- **Embed videos into your website**. As a general rule, websites should limit the number of times they direct users to other websites (you want users to stay on your website and read your information). By embedding videos directly into your webpage, your audience will be able to play videos without navigating to the YouTube website. See Resource 12 for more information.
- **Invite others to post images and videos**. Remember, social media is meant to be social! Get your audience to contribute images of the region, events, and people, and use those images to promote your municipality.

Flickr, launched in 2004 by a Canadian company, is owned by Yahoo.

With Flickr, you can tag photos, comment on them, submit pictures to groups, and print photos in creative ways. It is also easy to share photos with a Creative Commons copyright license and restrict their access.

Flickr offers limited free image hosting, and unlimited hosting for approximately $25/year.

For additional technical information on YouTube, Flikr, and other digital tools, see:

Resource 12: Additional digital tool "how-to"s

Getting prepared to lay your name claim

Even if you are not sure whether you need a website, Facebook account, Twitter account, or another online account, it is a good idea to claim your municipality's domain name, Facebook Page, Twitter name, and other social media. This helps ensure that your municipality stakes its claim online.

To prepare for setting up online accounts, you will need:

- Photo or logo that represents your municipality;
- A link to your municipality's website;
- The proper contact information, like email address, for the person administering the account; and,
- Brief description of your municipality. This description may include details about your terms of use for this particular account.

If you find that someone has already taken your chosen account name for social media applications, be creative and use underscores, periods, and/or hyphens to make a different name. You may also use your municipality's year of incorporation or preface your name with "Town of" (for example) to make your social media name unique.

Digital tools based on your capacity

Besides the most common digital tools for public engagement outlined above, a plethora of other digital and social media tools exist to choose from. This section will introduce and define some of these tools, outline the pros and cons of each, and explain their suitability for different types of engagement processes.

As you choose your tools, keep the following questions in mind:

- What is the purpose of my public engagement strategy? (specific application or overaching communication strategy)
- Who is my audience, and what tools are they using?
- What level of public input is needed?
- Based on my research, what are people saying about the municipality?

For more questions to consider before choosing your tools, see:

Resource 11: Choosing digital engagement tools (worksheet)

The following tables provide further details on tools most appropriate for municipalities with low, medium, and high digital engagement capacity.

Low capacity tools

Municipalities with low capacity may experience challenges in using digital engagement such as: little support from senior staff and council; limited budget and staff resources; and limited online access. However, one or more of the following list of tools may be appropriate for municipalities with low capacity for digital engagement:

Tools	Definition	Pros and Cons	Suitability
Website with Content Management System (CMS) (WordPress, Joomla, Drupal)	▪ Website with an administration tool that allows a large number of people to contibute content in specified boxes or fields.	▪ **Pro:** Efficient and easy to use tool for keeping a website up to date. ▪ **Con:** May require initial set up by web developer.	▪ Ongoing projects
E-newsletters helpers (Mail Chimp, Constant Contact)	▪ Tools that help you send many emails at once without triggering spam filters, and use templates for more professional formatting and colours.	▪ **Pro:** Fun and engaging. Can solicit photos and videos from the public, too. ▪ **Con:** Some cost money.	▪ Ongoing projects
Facebook Page and Poll	▪ Facebook Page allows you to post content that automatically appears on users' Facebook walls. Users subscribe to your postings by "liking" your Facebook Page and can participate in polls.	▪ **Pro:** Brings message to where people spend time, fosters feedback and discussion, potential for messages to go viral, drive traffic to website, attract people to specific events, builds social capital online and offline, free. ▪ **Con:** Requires moderation, privacy concerns, whether or not people receive your message depends on whether people are logged in, need effort to build a community.	▪ Single event ▪ Ongoing projects

Tools	Definition	Pros and Cons	Suitability
Twitter	▪ Status updates limited to 140 characters that are time and/or location sensitive and may ask people for ideas, share a link, or just be a reflection on something. Tool includes a minimal user profile, ability to follow other users, and ability to "retweet" other people's tweets or status updates.	▪ **Pro:** Open and transparent, huge membership, potential for viral messaging, free. ▪ **Con:** You never know who is listening, bias towards superficial interaction, requires maintenance (optimal 21 tweets/day).	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
LinkedIn	▪ Tool allows you to target communities of professionals to promote your company, post jobs, etc.	▪ **Pro:** Brings message to where people spend time, fosters feedback and discussion, potential for messages to go viral, drive traffic to website, attract people to specific events, builds social capital online and offline, free. ▪ **Con:** Requires moderation, privacy concerns, whether or not people receive your message depends on whether people are logged in, need effort to build a community.	▪ Ongoing projects
RSS (automatic distribution of online updates)	▪ RSS (Really Simple Syndication) is a standard format for sharing feeds of information, like news, comments, etc.	▪ **Pro:** Really simple - just set it up and forget it. Good way to get analytics. ▪ **Con:** Some cost money.	▪ Ongoing projects

Medium capacity tools

Compared to a low capacity municipality, a medium capacity community has greater access to high speed internet, more staff resources, and a higher level of senior staff and council support. In general, a medium capacity municipality has a greater budget and more flexibility with staff time and ability to try out more complex tools. In addition to the ability to use low capacity tools listed on the previous pages, medium capacity municipalities may wish to venture further into using the following list of tools:

Tools	Definition	Pros and Cons	Suitability
Photo Sharing Site (Flikr, Picasa, PhotoBucket, SmugMug)	▪ Share photos online, and can be used socially by asking people to contribute their own photos.	▪ **Pro:** Easy to set up and update, create a folksonomy using tags, ask people to "Like" media, continuous presence not required, photos are engaging. ▪ **Con:** Quite static, some cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Surveys and Polls (Facebook Poll, SurveyMonkey, SurveyGizmo, PollDaddy, Fluid Surveys, Lime Survey, Ascentum)	▪ Online form where participants provide structured or unstructured feedback. Can be combined with issues-based education.	▪ **Pro:** Multiple choice questions scale well, simple to use, many tools are free. ▪ **Con:** Qualitative answers don't scale well, users are not exposed to other people's input, no collaboration, some cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Event Registration (EventBrite, RegOnline, EventWizard)	▪ Online event invitation and registration system.	▪ **Pro:** Once people have registered, you can provide them with updates. Good way to gauge how many people may be attending an event. ▪ **Con:** People without internet access need another way to register. Cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Social Media Management Suites (Hootsuite, Tweetdeck, Seesmic, CoTweet, Bit.ly)	▪ Manage an organization's social media presence (multiple locations and accounts) through one tool. Bit.ly shortens URLs.	▪ **Pro:** Enables simple updating of multiple accounts. Provides a one-stop overview of social media accounts. ▪ **Con:** Some cost money.	▪ Single event ▪ Ongoing projects
Listservs +	▪ Email system with	▪ **Pro:** Flexible, familiar, and	▪ Single

Tools	Definition	Pros and Cons	Suitability
Email Notification Systems (Google Groups, Yahoo Groups, BB Press, Quora, MajorDomo, E-Democracy)	a hidden list of members where a message sent to one person is sent to all members of the email list. People have to explicitly opt-in to become a member of the email system.	potential for ongoing dialogue. Email is still the best way to reach many people. ▪ **Con:** Not scalable, email is becoming less popular compared to social media, difficult to analyze, challenging for collaboration, people tend to delete emails if there are too many, vocal members may dominate conversation, some cost money.	projects ▪ Ongoing projects
Voice and Video Meetings/Webcasts (Microsoft LiveMeeting, GoToMeeting, Skype, Justin.tv, Ustream, CoverItLive, WebEx)	▪ Live event, such as a conference call, chat room, webinar, etc where people observe and participate in a presentation.	▪ **Pro:** May parallel an in-person event, video is engaging and emphasis is placed on good slides, many tools are available. ▪ **Con:** Input not concise, expensive to scale, susceptible to technical difficulties, participants must be online at the same time, some cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Mapping (Google Maps, Google Earth, Yelp)	▪ Work together to identify places on a map.	▪ **Pro:** Good way to harness local knowledge and find out spatially-relevant information. ▪ **Con:** Some people do not think about their community from an abstract, aerial view.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Text Message (SMS Poll, SayZu)	▪ Contact people on their cell phone to conduct surveys, raise awareness, solicit donations, give updates, or provide transit or other service information.	▪ **Pro:** Many people have cell phones with text messaging, can combine input from in-person meeting with webcast. ▪ **Con:** Response limited to 160 characters, qualitative answers hard to scale, users often don't see other people's input, user pays for text, phone numbers needed. Cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Online Chat	▪ Text or video	▪ **Pro:** Usually is a one-to-one	▪ Single

Tools	Definition	Pros and Cons	Suitability
(Google Chat, AIM, IRC, ICQ, Facebook Chat, Skype)	chatting online.	chat between people but can be group chat. Free. ▪ **Con:** Someone has to be responsible to respond to chat requests, much like answering a phone.	event ▪ Ongoing projects ▪ Face-to-face meetings
Blogging (WordPress, Blogger, Tumblr)	▪ Blogs, Vlogs, Photo blogs, or Podcasts are regularly updated written/video/photo/audio commentary about a particular topic. Enabled commenting means that people who listen can write back to the author in public.	▪ **Pro:** Flexible, familiar, can have multiple authors, free, can be without comments. ▪ **Con:** Requires moderation, commenting can be a high bar for entry, requires a lot of time for writing and promoting, some cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Crowd Sourcing (YouTown, PlaceSpeak, Everyblock, Open 311, Amazon Mechanical Turk, Yelp)	▪ People contribute knowledge about products, places, etc. Host publicly uses or responds to information gathered.	▪ **Pro:** Harness the knowledge of many people (everyone is an expert). ▪ **Con:** May be challenging to restrict input to people just in your jurisdiction. Tool may require high speed internet. Cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Discussion Forum or Structured Online Collaboration (Google Groups, Yahoo Groups, BB Press, Quora, Considerate (high capacity))	▪ Users can create new topics for discussion, comment/post messages within a topic, reply to other peoples messages, moderate other users' input, direct message other users. Forum content can be visible to everyone or to just registered users.	▪ **Pro:** Flexible, familiar, discussions are topic-focused. ▪ **Con:** Requires moderation, posts appear in reverse-chronological order, requires reading many posts to understand a conversation thread, unattractive and cumbersome to find answers.	▪ Ongoing projects

Tools	Definition	Pros and Cons	Suitability
Wikis and Collaborative Writing (Google Docs, Social Text, PB Works, Wikispaces, MS Office Live (high capacity), Open Office (high capacity))	▪ People work together to write a document.	▪ **Pro:** Specific input, free. ▪ **Con:** Messy with many contributors, last editor wins, writing isn't fun, high bar for participation.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Input Analytics (Wordle, Tagxedo)	▪ Analyze and graphically display the theme of a document by focusing on the most prominent, repeated words.	▪ **Pro:** Provides a visually-pleasing graphical display of the document theme. ▪ **Con:** Prominent words may need to be edited, static, some cost money.	▪ Single event

High capacity tools

A municipality with high capacity has access to high-speed internet and online tools, has the staff time and knowledge to undertake a digital engagement process, and council and/or senior management support online public engagement. In addition to the ability to use low and medium capacity tools listed on the previous pages, high capacity municipalities may wish to venture further into the following list of tools:

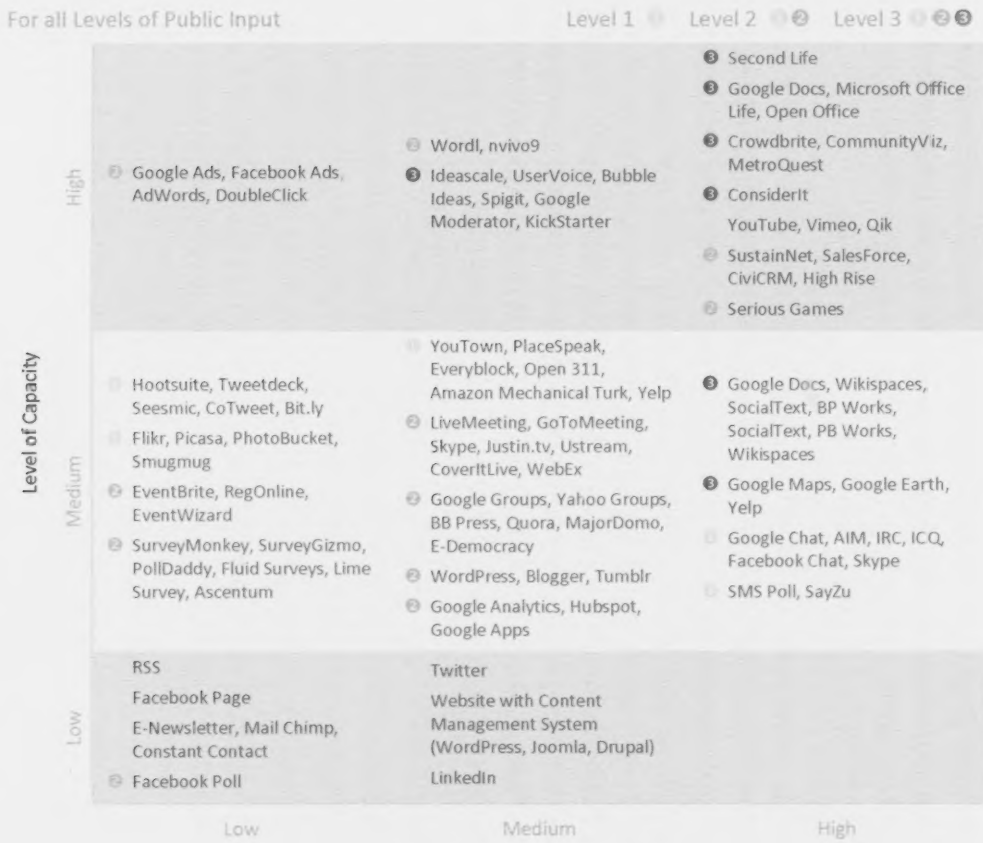
Tools	Definition	Pros and Cons	Suitability
Video Sharing (YouTube, Vimeo, Qik)	▪ Share videos online, and can be used socially by asking people to contribute their own videos.	▪ **Pro:** Create a folksonomy using tags, ask people to "Like" media, continuous presence not required, videos are engaging, free. ▪ **Con:** To create a community around the media is challenging. Video editing is time consuming.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Crowd Storming (IdeaScale, User Voice, Bubble Ideas, Spigit, Google Moderator, KickStarter)	▪ A focused brainstorming process where people submit a proposal or idea/question, users rank the submissions, and then people comment on the submissions.	▪ **Pro:** Clear, concise input, scalable, democratic, difficult to dominate the conversation, often free. ▪ **Con:** Organized minorities can manipulate the results, bias towards early submissions, and challenging to shift opinions or have learning.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Analytics (Google Analytics, Hubspot)	▪ Learning what types of people are engaged with your online tool and how engaged they are.	▪ **Pro:** Learn what is working and what isn't, many are free. ▪ **Con:** Hard to make use of metrics.	▪ Ongoing projects

Scenario Planning, Calculators, and Community Visioning (Crowdbrite, CommunityViz, MetroQuest)	▪ Online tool that helps people choose between alternative scenarios or see the effects of decisions made today.	▪ **Pro:** Can be fun, good for engaging youth or kids, shows that decisions have trade-offs which creates empathy for policymakers, educational. Often the scenario planner will show an aggregate of people's input so far. ▪ **Con:** Expensive to create and requires development team, can feel hokey or forced. Cost money.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Social Bookmarking or Link Sharing (AddThis, ShareThis, Delicious, Digg, Reddit, StumbleUpon)	▪ Users submit links to websites/ articles/ photos/ videos, and other users of the site vote up or vote down the links, so popular links rise to the top.	▪ **Pro:** Potential for message to go viral, free. ▪ **Con:** Systems are susceptible to gaming by vocal minority groups.	▪ Ongoing projects
Wikis and Collaborative Writing (Google Docs, MS Office Live, Open Office, Social Text, PB Works, Wikispaces)	▪ People work together to write a document.	▪ **Pro:** Specific input, free. ▪ **Con:** Messy with many contributors, last editor wins, writing isn't fun, high bar for participation.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Constituent Relationship Management (SustainNet, SalesForce, CiviCRM, High Rise)	▪ Tool for managing an organization's interactions with constituents including contact information, past and current project involvement as well as internal notes.	▪ **Pro:** Very important tool for organizing ongoing relationships with the public. Tracks engagement history and allows for sorting by interest. ▪ **Con:** Can be time consuming to set up and requires staff to incorporate a new tool into their workflow. Cost money.	▪ Single event ▪ Ongoing projects
Online	▪ Advertising to a	▪ **Pro:** Good way to reach	▪ Single

Advertising (Google Ads, Facebook Ads, AdWords, DoubleClick)	specific audience based on demographics, location and/or browsing habits (interests).	a targeted audience. ▪ **Con:** Cost money.	event ▪ Ongoing projects
Virtual Worlds (Second Life)	▪ A virtual place where people can get together. Often used simultaneously with a webcast for meetings.	▪ **Pro:** Helps online participants feel like they are attending something with other people because there is a sense of audience, free. ▪ **Con:** Can be distracting for the presenter to be presenting to a live audience and a virtual audience.	▪ Single event ▪ Ongoing projects ▪ Face-to-face meetings
Serious Games (uniquely developed)	▪ A fun way to grapple with a real world problem, like a budget, land use choices, or environmental problems.	▪ **Pro:** Can be fun, good for engaging youth or kids, shows that decisions have trade-offs which creates empathy for policymakers, educational. ▪ **Con:** Expensive to create and requires development team, can feel hokey or forced. Cost money to develop.	▪ Single event ▪ Ongoing projects

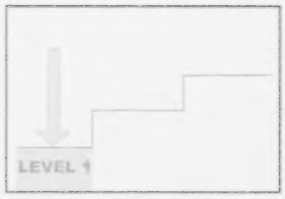
Digital tools based on your level of public input

The following diagram provides an overview of digital engagement tools arranged according to your level of capacity and your anticipated level of public input. The same tools can be used for a variety of public input levels and, as your level of capacity increases, you may wish to try additional tools. Remember that each level of capacity for digital engagement builds on the previous.



Please note: The tools identified for each level of public input are meant to build cumulatively with increased capacity, so if you are at level 3 capacity, any of the tools mentioned for all levels could be appropriate for your project.

Level 1



As described on page 1-6, Level 1 consultation is person-to-person contact with your constituents that happens as part of your regular business operations.

Digital tools for level 1 consultation include tools that help you:

- Listen to your community's broad concerns
- Stay in touch with members of your community in a general sense
- Share information about your programs and services with your community

For example, a councillor shows you an online discussion about potholes in your jurisdiction and requests that you address people's concerns. After deciding that your target audience is rate payers in your jurisdiction, you work with the Public Works department to set up a Twitter account for people to report potholes. The person in Public Works responsible for the Twitter account works with your communications staff to help answer questions and address concerns in a timely manner.

In another example, you have a new summer schedule for yard waste and organics pick-up. You put a "pick-up calendar" on your website and let people subscribe to updates by email, RSS, and/or text messages. You identify someone to respond to questions about which materials are considered organics or yard received via email from your website and email newsletters.

If you only do three things online:

1. **Listen Online**

   'Listening' refers to the use of monitoring and tracking tools to identify conversations that are taking place online. Listening online to your municipality's residents, businesses, and thought leaders can help you hear how satisfied and unsatisfied they feel about your municipality in general, the elected representatives, your service, and key issues in the community. Listening helps you identify what your municipality's online presence looks like, and can also help you identify contentious issues early on (see page 3-17 for listening tools).

2. **Regularly update your website and make feedback easy**

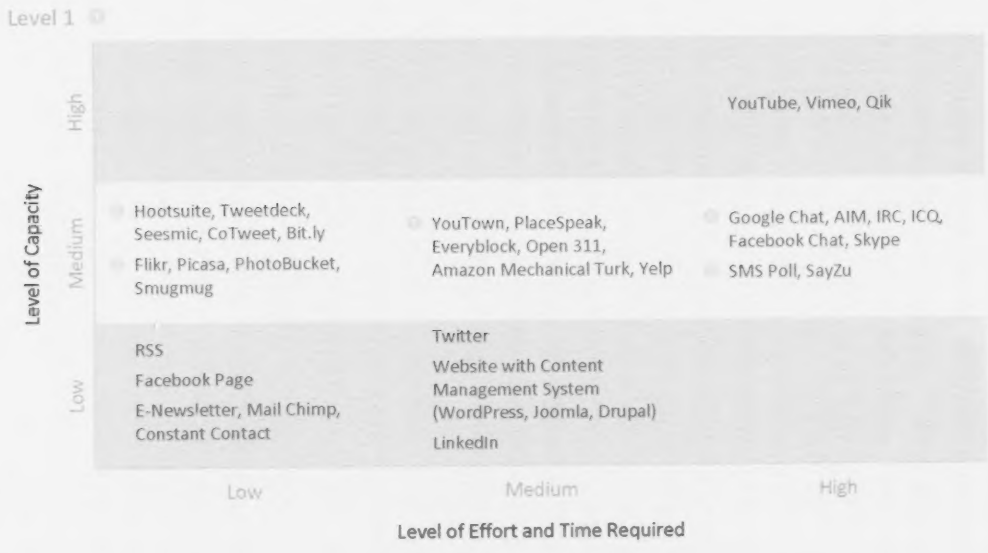
   Many people will search online first for information about your municipality. Work with your colleagues to set up an easy to navigate and easy to maintain website. To make the website easy for residents to use, try organizing information by service rather than municipal department. To make the website easy to update, try building your website with a content management system such as WordPress (CMS software, such as WordPress or Joomla, makes it easy for anyone in your organization to update content using defined web layout templates and content place holders). Choose one way that the public can get in touch with you online,

whether it be a simple email address, online comment box, or Twitter account. Then, be sure to monitor and offer replies on a regular basis.

3. **Choose one social media site to be active on and create relationships with constituents**

In your community, where are people active online and what do they talk about? Choose one online community (social networking site, local newspaper discussion forum, community blog) and commit to participating there. This will invest in relationships for future public engagements, provide a direct insight into that community's views on issues that matter to you most, and begin to build your staff's social media capacity.

If a higher level of effort is required for your public input, the following diagram offers some suggestions for online tools that may be helpful for level 1 consultation.



Level 2

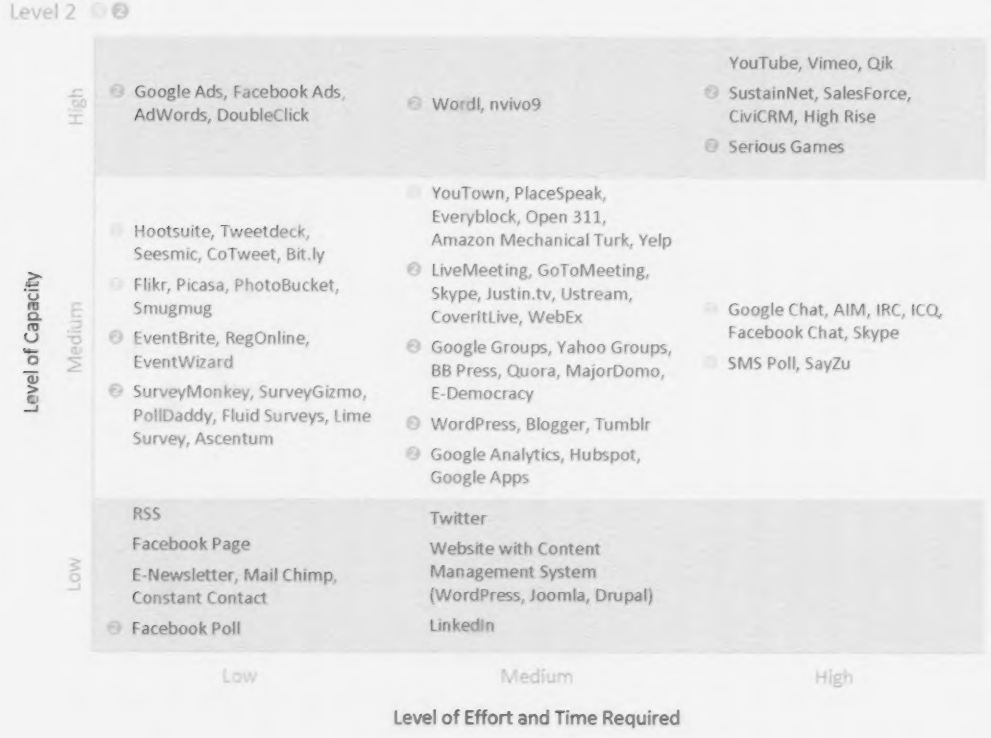
As described on page 1-10, level 2 consultation occurs when the issue, the geography, and/or the stakeholders are small in scope and specifically defined.

Digital tools for level 2 consultation include tools that help you:

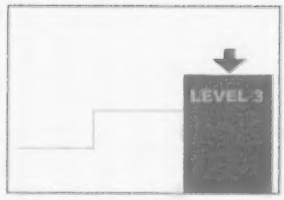
- Communicate changes in services that impact groups in your community
- Ask a specific group of stakeholders for feedback or input
- Listen to particular communities of interest

For example, you are in the process of updating dog licensing requirements and fees. After listening online to what people say about the dog licensing requirements and fees, you identify key stakeholders and influencers. You personally invite key stakeholders and influencers to give you ideas and feedback about the changes on your municipal website's comment box, Facebook Page, or Twitter account.

The following diagram offers some suggestions for online tools that may be helpful for level 2 consultation. Many level 1 tools can also be used for level 2 processes.



Level 3



As described on page 1-13, level 3 consultation occurs when a key decision is being made that affects important or potentially contentious issues such as taxes or property values, health and safety, lifestyles and habits, or brings up issues of fairness.

Digital tools for level 3 consultation include tools that help you:

- Solicit ideas, views and recommendations; or,
- Support and facilitate dialogue, deliberation, and other forms of collaboration.

For example, you are updating an Area Structure Plan and are beginning a lengthy public input process. To encourage people to attend your open house, you listen to what they say about their neighbourhood online, learning where residents spend time on the internet (in this case, a Facebook Page about their neighbourhood). A week before the first open house, you post a question on the residents' Facebook Page, asking them what they love about their community. A few weeks before the event, you also announce the public input process on your municipal website and Facebook Page, clearly identifying who people can contact (and how) if they have questions.

Many level 1 and 2 tools can also be used for level 3 processes.

Level 3 ❶❷❸

Level of Capacity	Low Effort and Time Required	Medium Effort and Time Required	High Effort and Time Required
High	❷ Google Ads, Facebook Ads, AdWords, DoubleClick	❷ Wordl, nvivo9 ❸ Ideascale, UserVoice, Bubble Ideas, Spigit, Google Moderator, KickStarter	❸ Second Life ❸ Google Docs, Microsoft Office Live, Open Office ❶ Crowdbrite, CommunityViz, MetroQuest ❸ ConsiderIt YouTube, Vimeo, Qik ❷ SustainNet, SalesForce, CiviCRM, High Rise ❷ Serious Games
Medium	❶ Hootsuite, Tweetdeck, Seesmic, CoTweet, Bit.ly ❶ Flikr, Picasa, PhotoBucket, Smugmug ❷ EventBrite, RegOnline, EventWizard ❷ SurveyMonkey, SurveyGizmo, PollDaddy, Fluid Surveys, Lime Survey, Ascentum	❶ YouTown, PlaceSpeak, Everyblock, Open 311, Amazon Mechanical Turk, Yelp ❷ LiveMeeting, GoToMeeting, Skype, Justin.tv, Ustream, CoverItLive, WebEx ❷ Google Groups, Yahoo Groups, BB Press, Quora, MajorDomo, E-Democracy ❷ WordPress, Blogger, Tumblr ❷ Google Analytics, Hubspot, Google Apps	❸ Google Docs, Wikispaces, SocialText, BP Works, SocialText, PB Works, Wikispaces ❸ Google Maps, Google Earth, Yelp ❶ Google Chat, AIM, IRC, ICQ, Facebook Chat, Skype ❶ SMS Poll, SayZu
Low	RSS Facebook Page E-Newsletter, Mail Chimp, Constant Contact ❶ Facebook Poll	Twitter Website with Content Management System (WordPress, Joomla, Drupal) LinkedIn	

Level of Effort and Time Required

6. Glossary

Application
An application is a program or software. Mobile applications, or apps, are programs that can be downloaded from the internet onto a phone. For example, apps are available for iPhone from the iTunes store and for Android from the App Market.

Application Programming Interface (API)
API is a set of rules and specifications that software uses to communicate with each other. For web applications, like Google Maps, Facebook, Twitter, etc., API refers to the way that third party software interacts with and extends with the web application. For example, Google Map Mash-ups are created using Google Maps API, and Twitter applications like Tweet Deck work by accessing the Twitter API.

Blog
A blog or "weblog" is an interactive, multimedia website that has one or many authors and is updated on a regular basis (via "posts") and displayed in reverse-chronological order. Many blogs provide opinion or commentary on a particular subject. While most blogs contain primarily text content, people also create and maintain photo blogs, video blogs (vlogs), and music/audio blogs (podcasts) (Wikipedia).

Creative Commons Licensing
A group of copyright licenses that allow for the distribution of copyrighted work for no charge. Licenses may require source attribution, non-commercial use, no derivative works, and distribution under the identical parent license, or a combination thereof (Wikipedia).

Crowdsourcing
An activity where a large group of people collectively create work whose value far exceeds that provided by any of the individual participants. Examples include: Amazon.com's Mechanical Turk, Wikipedia, Twitter, eBay.

Digital Media
Digital media is content, software and hardware. Text, graphics, audio, and video transmitted over the internet are the content that drives digital engagement. In simple terms, software manages the content. Hardware are the computers, phones and accessories that feature the software.

e-Government
Also known as Gov 2.0, e-gov is a digital interaction between government, citizens, businesses, government agencies, and non-governmental organizations. E-gov involves broadcasting information over the internet (such as services, public hearing schedules,

notification), communicating between government and another organization, conducting transactions, and improving governance (Wikipedia).

Forum
A discussion board on the internet. Forums contain topic-based sub-forums. A conversation in a forum about a particular topic is a "thread." Forums tend to have a hierarchical membership system, with administrators who manage the site, moderators who keep discussion according to forum rules, registered members, and visitors (who are not logged in). Each type of user has a different level of access to the site.

Gov 2.0
Gov 2.0, or Open Government, is a governing method that utilizes online, mobile and internet-enhanced face-to-face techniques to offer communication between government, citizens and stakeholders. The intent is to increase transparency of operations, improve public participation, and inspire collaboration and innovation through better government openness, accountability, and effectiveness.[6] These changes are fundamentally transforming the way government works, both internally and externally.[7]

Information and Communication Technology (ICT)
An umbrella term that refers to all technical means to communicate information, including computer and network hardware, devices, and software (Wikipedia).

Media Sharing Site
A site where people can share art, photos, video, and audio content.

Mobile Media
Mobile media refers to content that is communicated from mobile hardware, such as a smart phone (cell phone that accesses the Internet). Three important mobile technologies for public engagement are text messaging, mobile-friendly websites, and downloadable mobile apps that interact with a smart phone's GPS, camera, or text/multimedia messaging capabilities.

Online Media
Online media describes any content that is communicated through the internet. Information sharing on the internet has revolutionized recently from traditional one-way

[6] Obama, Barak. 2009. "Transparency and Open Government: Memorandum for the Heads of Executive Departments and Agencies." *Federal Register*.
http://www.whitehouse.gov/the_press_office/TransparencyandOpenGovernment/

[7] For more in-depth information about Gov 2.0/Open Government, see O'Reilly, Tim. 2010. *Government As A Platform*. O'Reilly Open Feedback Publishing System.
http://ofps.oreilly.com/titles/9780596804350/index.html

communication (static websites) to interactive and participatory communication, known as web 2.0.

Online Poll
A type of web-based survey where people complete a questionnaire. Online polls may be open to anyone, or they may be restricted to a sample.

Open Data
Refers to providing online access to data in a standards-compliant manner.

Open Government
Set of principles to increase government transparency, accountability, and improve citizen participation. This concept is related to e-Government and Open Data. Calgary and Edmonton have Open Data policies.

Open Source Software
Computer software that has publically available source code and a copyright license that allows users to study, change, improve, and distribute the software. Often open source software is developed within a community of developers and distributed at no cost (Wikipedia).

Prediction Market
Also known as decision market, idea futures, predicative market, or information market. Involves anonymous users speculating on the probability of an event occurring by buying and selling shares in the market (Wikipedia). Prediction markets are used in participatory settings when the question has a quantitative answer and may or may not involve real money.

Quick Response (QR) Code
Square barcode that is readable by mobile phone cameras. The information in the code can be text, a web address (URL), or other information.

Smart Phone
Mobile phones that run a complete operating system and can multitask software (Wikipedia). Most connect to the internet through high-speed cellular networks and/or wi-fi capabilities. Phone software includes Symbian, Palm, Windows Mobile, BlackBerry, Android, and iOS.

Social Media
Social media is internet-based media like text, photos and videos that is specifically shared by its authors. The content is "social," because it starts conversations, encourages further sharing, and fluidly travels from one context to another. In practice, social media allows people to communicate and collaborate on ideas, art and media, maps, product

and business reviews, software development, and many other activities. Some typical tools include social networking sites (ex. Facebook, LinkedIn), blogs, and micro-blogs (ex. Twitter).

Social Networking Site
Online service or software platform that focuses on building connections between people who share interest and/or activities. Social networks provide a user with a profile and means to connect with friends.

Spam
Unsolicited or undesired electronic messages sent via email, chat systems, site comments, search engines, text messages, social networking sites, etc. Messages often contain nonsensical or fraudulent content.

User-Populated Maps or Map Mash-ups
Online maps where users populate the data. Mash-ups bring in map data from many sources. One example is the City of Ottawa's Interactive Traffic Map (http://traffic.ottawa.ca/), which shows construction, accidents, parking, bike routes, and traffic cameras on a Google map.

URL
The address of a webpage on the internet, indicated by http://www.

Web 2.0
Web 1.0 is the online experience where content is pushed out, or broadcast, to users in a one-way communication (the majority of the internet prior to approximately 2004). Web 2.0 engages website visitors in a two-way conversation via opportunities to upload content, publicly respond to posts by website authors, and shape individual user experience through content personalization. Collaboration and interaction are the goals of Web 2.0.

Widget
Small application or code snippet that can be installed on a webpage. Common widgets include Twitter feeds, Facebook Fan boxes, Amazon.com recommendations, real-time weather statistics, and chat boxes. Widgets are also referred to as badges and gadgets.

Wiki
Type of website where people can create and edit interlinked web pages using a simple markup language.

7. Further information and references

Public involvement resources

The National Coalition for Dialogue and Deliberation is a community of practice for people who involve the public in decision making and exploring complex issues. Read their Resource Guide on Public Engagement for useful explanations, resources and stories.
http://www.ncdd.org/files/NCDD2010_Resource_Guide.pdf
Also see the resources at http://ncdd.org/rc/beginners-guide

Online guides can be found at the Local Government Commission (an American non-profit organization) website, located at
http://www.lgc.org/freepub/land_use/participation_tools/index.html

An excellent overview of public consultation and engagement guidelines and resources for local governments can be found at an Australian website—the Local Government Consultation and Engagement website—located at
http://www.vlgaconsultation.org.au

You can find further discussion of consultation tools at the website of the International Association for Public Participation, under "Practitioner Tools" at
http://www.iap2.org/

If you are interested in applying Geographic Information System technology to public participation in your municipality, you may wish to visit the website of the Urban and Regional Information Systems Association (URISA) http://www.urisa.org/. Look for any references to PPGIS (Public Participation Geographic Information Systems), including the conference held in summer of 2005.

Desmond Connor, of Connor Development Services Limited, maintains a useful online library of public consultation references, bibliographies and case-studies at
http://www.connor.bc.ca/connor/library.html

Alberta Municipal Affairs maintains the Municipal Excellence Network, a website initiated to assist in effectively managing challenges in today's municipalities. It can be found at http://www.menet.ab.ca/bins/index.asp

Digital engagement resources

Guides to digital public involvement

Published by the IBM Center for the Business of Government, **Using Online Tools to Engage – and be Engaged by –The Public**, helps public managers make use of the various digital engagement tactics and tools currently available to them, and describes when they work best.
http://www.businessofgovernment.org/report/using-online-tools-engage-public.

Making the Most of Social Media: 7 Lessons from Successful Cities - is written for local governments that are beginning to experiment with social media and would like to get more out of them. In this report, Fels Institute of Government distils the positive and challenging experience of cities into seven suggestions that cover the full cycle of a project.
https://www.fels.upenn.edu/sites/www.fels.upenn.edu/files/PP3_SocialMedia.pdf

UK Improvement and Development Agency's **Connected councilors: A guide to using social media to support local leadership** is a basic guide for elected officials in the UK that describes what social media is, what some of the common tools are, and how to use them.
http://www.idea.gov.uk/idk/core/page.do?pageId=17797214

The National Academy of Public Administration has published **Tools for Online Idea Generation: A Comparison of Technology Platforms for Public Managers**. This latest document compares ten online tools for idea generation including key benefits and pricing information.
http://www.collaborationproject.org/tools-for-online-idea-generation/

ParticipateDB is a rich catalogue of online tools for public participation. Case studies and tools are both featured.
http://participatedb.com/

Promising Practices in Online Engagement is a Public Agenda paper that surveys a selection of online engagement practices, from high-level national politics to local neighbourhoods.
http://www.publicagenda.org/files/pdf/PA_CAPE_Paper3_Promising_Mech2.pdf

General usage, statistics, and analysis

A number of organizations track online activity and create free and useful guides for how to use digital tools more effectively.

Pew Internet & American Life Project

An American research organization that does some of the best research in North America about how people are using the Internet in their civic life.

http://www.pewinternet.org

comScore

comScore measures online activity and is a source of digital marketing intelligence, compiled through behavioral and survey insights. comScore releases many free reports on online activity as well as sophisticated software for measuring the effectiveness of digital engagement.

The 2010 Canada Digital Year in Review.

http://www.comscore.com/Press_Events/Presentations_Whitepapers/2011/The_2010_Canada_Digital_Year_in_Review

Fenton Communication

Fenton is a public interest communications firm that mainly works with organizations focusing on social issues. In the Resources portion of their website, Fenton has guides on how to brand public interest and non-profit organizations, as well as launch and sustain advocacy communications.

WATTA? What Are They Talking About?

The WATTA? Guide provides an overview of Web 2.0, social media, and how to use tools effectively

http://www.fenton.com/resources/watta-what-are-they-talking-about/

Proving Your Worth: 10 Ways to Measure Your Impact

This guide, although designed for non-profits or advocacy groups, gives some easy-to-understand tips on how to measure whether your communications efforts are working.

http://www.fenton.com/resources/proving-your-worth-10-ways-to-measure-your-impact/

Hub Spot

HubSpot is an inbound online marketing firm that specializes in increasing website visitors and leads through search engines, blogs and social media. They publish a number of free reports on how to use blogs and social media more effectively, as well as how much people use different tools on the internet.

How to Monitor your Social Media Presence in 10 Minutes a Day

This helpful guide briefly defines popular social media sites, what they are used for, and how to engage with them in a short period of time.

http://www.hubspot.com/archive/social-media-monitoring-10-minutes-a-day-marketing-webinar/

How to Leverage Social Media for Public Relations Success

This document has tips for how to get in contact with online journalists, write story pitches, monitor social media for PR crises, and use awards and speaking engagements to their full advantage.

http://www.hubspot.com/Portals/53/docs/hubspot_social_media_pr_ebook.pdf

Ipsos Reid

Ipsos is a survey-based marketing and research firm that develops and builds brands, assesses market potential, interprets trends, and helps clients build relationships with their customers and employees.

Canadian inter@ctive Reid Report: 2011 Fact Guide

Since 1995, Ipsos Reid has tracked Internet usage and attitudes among Canadians., making the Ipsos Canadian Inter@ctive Reid Report the longest running and most comprehensive, authoritative study of Canadians and the Internet in Canada. The 2011 Fact Guide is a free snapshot of this fee-based subscription service.

http://www.ipsos.ca/en/products-tools/media-content-technology/consumer-trends-product/canadian-interactive-reid-report.aspx

Social Media Examiner

A free online magazine that helps businesses learn how to leverage Facebook, Twitter, and LinkedIn to generate leads, sales, and brand awareness. Technorati and AdAge rank SME as one of the world's Top 100 business blogs.

2011 Social Media Marketing Industry Report

This report examines how marketers use social media to grow their businesses.

http://www.socialmediaexaminer.com/social-media-marketing-industry-report-2011/

Web analytics demystified

Web Analytics Demystified is a consulting firm that helps companies measure and interpret digital engagement data.

Measuring the Immeasurable: Visitor Engagement

This technical white paper describes how common digital engagement metrics can be reconsidered to be more accurate and tell a better story.

http://www.webanalyticsdemystified.com/downloads/Web_Analytics_Demystified_and_NextStage_Global_-_Measuring_the_Immeasurable_-_Visitor_Engagement.pdf

Social Marketing Analytics: A new framework for measuring results in social media

This report is helpful if you need to choose a web analytics vendor based on what you are trying to achieve with your online presence.

http://john.webanalyticsdemystified.com/2010/04/22/new-research-on-social-marketing-analytics/

Visitor Engagement: A "No Excuses" Approach to Measure Engagement in the Digital World

This white paper is an easy to read guide for measuring digital engagement in a variety of sectors, like government, online retail, and travel. The tips are more specific to comScore analytics software.

http://www.nedstat.com/downloads/resources/white_paper_visitor_engagement.pdf

Tool-specific usage statistics and analysis

These resources are a tool-specific look at best practices for using digital engagement.

Facebook

Buddy Media: Buddy Media's 2011 Whitepaper on "Strategies for effective Facebook wall posts" looks at the user activity and engagement for 200 of their clients and reports best practices for Facebook usage.

http://forms.buddymedia.com/whitepaper-form_review-strategies-for-effective-facebook-wall-posts.html

Facebook Press Room: Has up-to-date worldwide statistics on the number of people on Facebook, how active people are, and mobile and application status.

http://www.facebook.com/press/info.php?statistics

New Organizing: New Organizing's "Use Facebook Friend Lists for privacy and organizing" blog post on Facebook provides privacy tips for organizers. Because Facebook is a personal platform, associating your professional life with your personal life can bring some challenges. This tip sheet shows you how to create privacy settings that can help you manage who sees what on Facebook.

http://neworganizing.com/2011/05/04/tip-use-facebook-friend-lists-for-privacy-and-organizing/?akid=555.12385.Y1kx1g&rd=1&t=3

Social Bakers: These Canada-specific statistics show how many people use Facebook in Canada, their demographics, and ad prices.

http://www.socialbakers.com/facebook-statistics/canada

Virtue: Virtue's 2010 whitepaper on "Anatomy of a Facebook Post" studies how posts perform by type, day of week, and time of day.

http://vitrue.com/blog/2010/09/21/anatomy-of-a-facebook-post-vitrue%E2%80%99s-data-behind-effective-social-media-marketing/

Twitter

Twitter releases very few statistics about its users, including user demographic and online activity information.

Twitter Blog: Occasionally, the Twitter Blog will publish statistics on the website's growth. At publication date, February 2011 was the most recent update.

http://blog.twitter.com/2011/03/numbers.html

HubSpot: This HubSpot blog post, "Is 22 Tweets Per Day the Optimum?," examines what the optimal number of tweets is per day, based on user engagement.

http://blog.hubspot.com/blog/tabid/6307/bid/4594/Is-22-Tweets-Per-Day-the-Optimum.aspx

Sysomos: This "Replies and Retweets on Twitter" article examines the power of retweeting in spreading messages, showing when the most activity about a tweet happens.

http://www.sysomos.com/insidetwitter/engagement/

Open Government Resources

Government as a platform

O'Reilly: O'Reily's "Government as a Platform" publication on Open Government / Gov 2.0 describes why governments are choosing to embrace open standards and what kind of effect open standards are having on governance.

http://ofps.oreilly.com/titles/9780596804350/index.html

Government social media policy and guides

Center for Technology in Government: "Designing Social Media Policy for Government: Eight Essential Elements" explains 8 elements that should be in a government's social media policy, including employee access, account management, acceptable use, employee conduct, content, security, legal issues, and citizen conduct.

http://www.ctg.albany.edu/publications/guides/social_media_policy/social_media_policy.pdf

Fels Institute of Government: "Making the Most of Social Media: 7 Lessons from Successful Cities" is a report aimed for local government communications staff that will help them use social media.

http://www.fels.upenn.edu/news/making-most-social-media

Social Media Governance: "Analysis of Social Media Policies: Lessons and Best Practices" is a summary of best practices for organizations that use social media to consider following. The Social Media Governance website also lists social media policies for large organizations like BBC, Best Buy, Coca-Cola, etc.

http://socialmediagovernance.com/policies.php

UK Improvement and Development Agency (IDeA): "Connected councilors: A guide to using social media to support local leadership" is a basic guide for elected officials in the UK that describes what social media is, what some of the common tools are, and how to use them.

http://www.idea.gov.uk/idk/core/page.do?pageId=17797214

Section 4

Resources

SECTION 4

Resources

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Resource 1: How much public input is appropriate? (worksheet)

1. What decision is being made? (see question 2 on Resource 3)
2. Who is likely to be affected? (identify the "communities" that care about this decision)
3. Do stakeholders have specific perceptions related to this decision?

Will this decision be perceived to:	No (1)	Mixed or Unsure (5)	Yes (10)
▪ be connected to any significant past issues or poor relationships with stakeholder communities?			
▪ decrease property values or increase taxation levels?			
▪ create or increase any health or safety risk?			
▪ given anyone an unfair advantage (i.e. create "winners")			
▪ create undesirable aesthetic changes (e.g. view, odour, noise)?			
▪ interfere with daily lifestyle and habitual patterns of people (i.e. loss of access, congestion, restriction of activity)?			
▪ be an emotional or moral "hot button?"			
▪ other:			
TOTAL OF RATING SCORES			

Score 1 point for each "No" rating, 5 points for each "Mixed or Unsure" rating, and 10 points for each "Yes" rating. Total the ratings. If there are any other factors that would add to the risk of public controversy, add up to 10 points to the total (i.e. rate "other factors" on the same 1, 5, 10 scale).

If you have difficulty answering any of the above questions, call five or more stakeholders to find out how they perceive this decision (see QuickTest, Section 1, p. 1-4).

After you have rated each of the above questions, calculate the appropriate public input level, based on the total of the rating scores.

If total is in the following range	Select this level of public input
> 50	Level 3
30 - 50	Level 2
< 30	Level 1

Note: Consider the level of resources you have available before you finalize your recommendation. In some cases, you may choose a lower level of input than the initial score would suggest if your municipality cannot afford to do more. Remember, these figures only provide a rough guide. Your good judgement is more important than the numbers.

Resource 2: Budget considerations for public engagement (worksheet)

Human Resources:

- ☐ Staff time
- ☐ Hiring student/stakeholder champions

Advertising and Communications:

- ☐ Translation services
- ☐ Advertising (newspaper, radio, TV)
- ☐ Branding of project (graphic design and copy-writing)
- ☐ Telephone hotline
- ☐ Posters
- ☐ Display materials
- ☐ Mail-outs
- ☐ Printing
- ☐ Prizes (incentives)

In Person Events:

- ☐ Room/facility booking
- ☐ Tables and chairs
- ☐ Tablecloths
- ☐ Outdoor tents
- ☐ Food and beverages (catering)
- ☐ Materials (registration sheets, nametags, flip charts, easels, pens, markers, sticky notes, paper)
- ☐ Material creation and printing (brochures, display boards, signs, posters, workbooks)
- ☐ Specialized tool creation (i.e. charrette materials)
- ☐ Prizes (incentives for participation)
- ☐ Childcare
- ☐ Specialized facilitation services (outside facilitator, graphic facilitator, youth engagement specialist)
- ☐ Transportation vouchers for participants
- ☐ Transportation for staff and materials
- ☐ Transcription services
- ☐ Translation services
- ☐ A/v equipment: projector, screen, microphone, power cords, power source, speakers
- ☐ Waste services (garbage, recycling, composting)

Digital Engagement Tools:

- ☐ Hardware (laptops, projectors, ipads, mobile phones, kiosks)
- ☐ Video camera, camera, digital recorder
- ☐ Website (creation of standalone or addition of project information to existing)
- ☐ One-time, annual, or monthly costs for other digital tools
- ☐ Staff time to set up digital tools
- ☐ Public education sessions on tools

Other:

Resource 3: Developing a terms of reference for a level 3 public input process (worksheet)

Note: This worksheet is generic, so it is designed to accommodate the information you will require for a Level 3 process. Smaller processes require less information. See Resource 4 for a sample terms of reference.

1. **Purpose:** *Why is a decision required at this time? Describe Council or administrative decision.*

2. **Decision statement:** *Describe the decision that needs to be made. Describe it as a choice among options, not as a "take it or leave it" proposition.*

3. **Public decision:** *Will Council make a public decision based on this input? Are other communities or agencies involved in the decision process? Is there an appeal process?*

4. **Public input:** *What public notification and input are required (by legislation or bylaw)? How will public input be linked to a decision by Council (e.g. reports, public hearing)?*

5. **Intended results:** *What does the municipality want as a result of requesting public input?*

6. **Principles:** *What will make your consultation process credible and effective? Refer to adopted principles and ethical guidelines (including privacy requirements).*

7. **Scope:** *Define the communities (of people and of interests) that need to be consulted (see Defining the Communities, p. 1-18). Describe the methods you would like to use to support public input.*

8. **Initial schedule and budget:** *Describe the schedule you propose for public input, including all key steps in the process. Identify the budget and resources available.*

9. **Consultation team:** *Describe who will be responsible for supporting the consultation process, including the following areas:*

Area of Responsibility	Person Responsible
Coordinating consultation with planners/designers	
Media relations	
Public information development and dissemination (including meeting posters)	
Developing and maintaining a list of stakeholder contacts	
Developing and maintaining a database showing input and municipal responses	
Organizing and conducting meetings	
Organizing and maintaining digital engagement	
Organizing and coordinating correspondence (mail or electronic)	
Other	

PUBLIC INPUT TERMS OF REFERENCE
Responding to Market Demand for Commercial Lots

1. **Requirement for a Decision**
   Administration has informed Council there is only one serviced commercial lot remaining in the commercial zone, which was established in 1995. The municipality is considering whether to provide additional land zoned for commercial use in order to meet growing demand.

2. **Decision Statement**
   What is the best way for our municipality to respond to expected demand for serviced commercial lands?

   Public discussion of this issue is required because Council may have to amend or pass a zoning bylaw, or even request an annexation. The options likely to be discussed include the following:

   - *Make no changes at this time.*
   - *Expand the existing Egmont commercial zone (zone 13) into the southeast (this would reduce the supply of residentially zoned land in that area).*
   - *Create a new commercial zone in the southwest area (this would affect traffic and existing residents to some degree).*
   - *Work with Stepford County to develop an intermunicipal plan that identifies shared plans and options for commercial expansion.*
   - *Initiate negotiations with Stepford County regarding annexation of lands to the north of the existing Egmont commercial zone.*

   Other options may be identified.

3. **Public Decision**
   Currently, public input gathered would be provided to the Planning Committee (a subcommittee of Council) to be considered when the Committee produces a recommendation to Council. If they recommend changes to zoning, there will be public hearings on the matter. It is expected that Council will eventually pass or amend a bylaw to address the matter. There is a possibility an intermunicipal plan will be required.

4. **Public Input**
   In order to make a well informed decision, the Planning Committee wishes to hear from citizens living in areas that may be affected by any of the options being considered. At this time, the Committee is particularly interested in which options citizens prefer (public input), and also would like to hear about any concerns that arise as these options are discussed.

   If the Committee makes a recommendation to Council which includes changes to zoning, intermunicipal plan or potential annexation, then formal public notification and a public hearing will be required before Council can proceed to second reading of the proposed bylaw or bylaw amendment.

   A digital engagement strategy may also be implemented to provide information and gather feedback.

5. **Intended Results**

The Planning Committee would like to achieve the following results during the public input process:

- All citizens who may be affected are informed of the decision being considered, and of the opportunity to provide input.
- Citizens are given fair, and accessible opportunities (more than one) to provide input.
- Our neighbour municipality, Stepford County, is kept well informed of the discussion and good relations with County administrators and elected officials are maintained.
- A full range of citizen opinions about this matter are identified and reported.
- The Committee has a clear understanding of citizen preferences, and the reason for those preferences, as a result of the public input process.

6. **Principles**

The public input process will conform to the municipal public input principles listed below:

- Early, open dialogue will be encouraged.
- All options being considered will be clearly described.
- Public information will be fair and every effort will be made to remove bias.
- Ample notice will be given to all citizens who are affected. Where there is doubt, the municipality will err on the side of providing notification.
- A summary of all public input gathered will be made available to any interested person.
- The process will be run in a manner that promotes cooperation, trust and community ownership.

7. **Scope of Consultation:**

The matter being discussed could potentially affect any citizen of our municipality, the administration and elected officials of Stepford County, or citizens of adjacent areas of Stepford County. The process will be designed to ensure media notification of all affected citizens, and direct notification of the following:

- Residents living within 250 metres of the potential expansion area southeast of Egmont commercial zone.
- Residents living within 250 metres of the potential new southwest commercial zone boundary.
- Developers who hold property within either of the areas described above.
- The Benchlands Protection Group (which has expressed an interest in conserving portions of the possible expansion area).
- Transportation Committee members.
- Stepford County administration.

While these groups are a priority for notification, input of any interested person or agency is valued and will be considered.

8. Preliminary Schedule and Budget

The preliminary schedule for the public input process is described below:

Approval of public input process	September 4
Finalization of meeting dates and public materials	September 16
Public notification (direct contact sent out)	September 21
Media notification	September 20-29
Neighbourhood contacts and public meetings	October 6-30
Initial meeting with Stepford county	October 5-10
Draft summary report of input received	November 12
Planning Committee review complete	November 26
Revised summary report made available to public	December 8
Submission to Council, first reading	January-March

The initial budget for the public input process is $10,000.00

9. Consultation Team

The following persons would support the public input process:

Coordinating consultation with planning	Monica Reddens
Media relations	Carolyn Spacini
Public information development and dissemination	Jerry Turner and Carolyn Spacini
Developing and maintaining a list of stakeholder contacts	Jerry Turner and Brenda Chynoweth
Developing and maintaining a database showing input received and response to input	Jerry Turner and Brenda Chynoweth
Organizing and conducting meetings	Jerry Turner (with Monica Reddens and Carolyn Spacini)
Organizing and coordinating a digital presence	Jerry Turner and Carolyn Spacini
Organizing and coordinating correspondence	Jerry Turner
Intermunicipal liaison	Monica Reddens

Note: Councillor Cheryl Battinski (chair of the Planning Committee) has indicated a high interest in this process and will play an active role in establishing good public information and in organizing effective public meetings.

Resource 5: Public input sketch (worksheet)

Case Study Name:

Two Communities of Interest:

1. What will make each community interested in participating? How would you contact them?

2. Select a municipality represented in your group. What resources (personnel and funding) would likely be available to support this public input process?

3. What information do you need from these communities to ensure that you can confidently present recommendations to council?

4. What challenges might you anticipate that could affect satisfaction with the outcome?

Resource 6: Sample meeting agenda

TOWN OF BRAVEBROOK
Public Meeting Regarding Access Changes to Brookside Park

Date: August 15, 20xx
Time: 7:00 to 9:00 p.m. (coffee, juice and donuts will be served)
Location: Downstairs meeting room at the Recreation Centre (103 - Fifth Avenue)

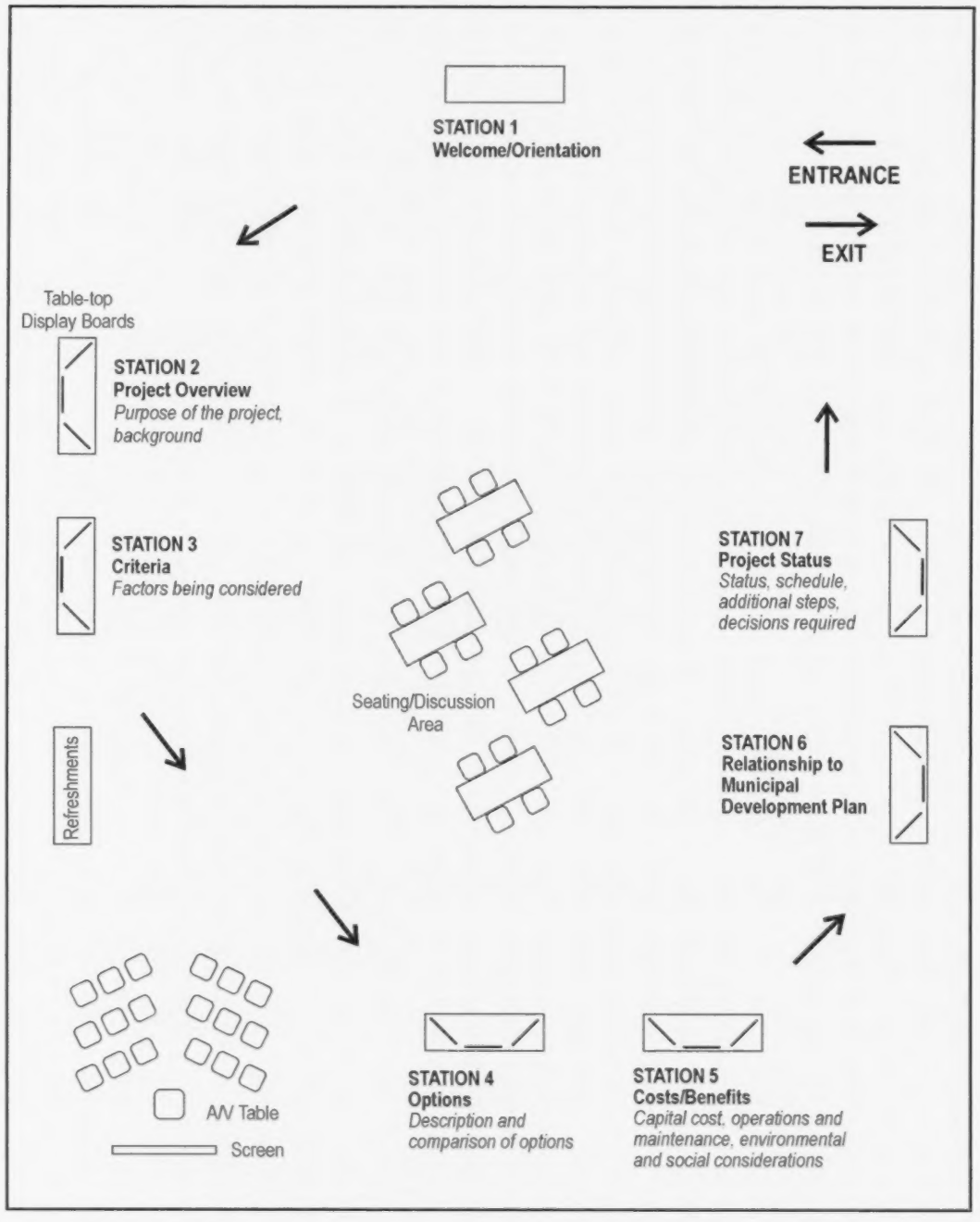
Purpose: To inform citizens about potential access changes to Brookside Park, and to gain advice about planning and implementation of the changes.

Situation: The existing access to Brookside Park is currently creating a congestion and safety problem on First Avenue. The access could be moved to Fifth Avenue or to Rose Street in order to minimize the problem. *(Note: An explanation of the access concerns and options is available at the information desk in the Recreation Centre, weekdays from 9:30 a.m. to 5:30 p.m.)*

AGENDA

1. **Introduction**
   - Review of Council direction
   - Overview of problem and potential solutions
2. **Review of criteria for access location**
   - Public input about what factors should be considered
3. **Review of access location options**
   - Public input about which option is preferred
4. **Next steps**
   - Summary of meeting
   - Committee and Council review
   - How to stay involved
5. **Adjournment**

Resource 7: Sample display plan for open house meeting



Resource 8: Guide for facilitators and recorders

The basic activities of the **FACILITATOR** are to:

- ❑ Keep everyone on time. Establish how much time each part of the discussion should take and make participants aware when it is time to move on.
- ❑ Keep everyone focused on a single question. Display the focus question and keep bringing people back to that question. (e.g. "...can you tie that idea into the question we are working on?")
- ❑ Help participants clarify their point to the group. Make sure that everyone understands the point that is being made. It is helpful to summarize the point if the speaker has rambled.
- ❑ Ensure that many people are heard, and intervene if any individual takes up more than a fair share of the available time. It is ok and necessary to point out to people that they have already made more comments than anyone else and that you want to hear from others. It is also ok to specifically ask for comments from people who have not yet said anything.
- ❑ Summarize the discussion at appropriate times (e.g. when closing discussion of a point and moving on to another point).
- ❑ Prevent personal comments, especially blame or slander.
- ❑ Show an unbiased interest in every comment that is brought forward. Be enthusiastic about the discussion.
- ❑ Help the recorder accurately record the point that is being made. If you are unsure that the recorder got the point, ask the recorder to state what they have recorded.

The **RECORDER** takes notes of what people say at the meeting and produces an accurate record of the meeting as soon as possible after the meeting. The record may be unseen by the participants or, if transparency is important, the recorder may produce a "group memory" which is prominently visible to the participants. The basic activities are to:

- ❑ Be clear before you begin whether the comments are to be attributed to individuals, to communities of interest, or rather are to be unattributed.
- ❑ Keep each point brief but do not leave out critical facts or information. When you are recording a "group memory," expect that the speaker will correct you from time to time. If you are unclear about the point being made, ask the facilitator to clarify the point.
- ❑ Ensure that every point that is made is "tagged." This can be simply done by writing the date and/or location on each page, and then numbering or lettering each point. Number the pages. The tags help people refer back to the point, and also ensure that the pages are in the right order after the meeting ends.
- ❑ If you are one of several recorders, put a name on the file so that it is easy to determine which group you recorded.
- ❑ Make eye contact with speakers from time to time to confirm that you are listening. If the record is not visible to the participants, then make it obvious that you are recording.

Resource 9: Evaluating capacity for digital engagement (worksheet)

Digital Engagement Project Name:

Digital media tools require time, commitment, and (sometimes) financial resources. So, it is important to determine if you have identified and addressed any major hurdles to the success of your Digital Engagement project. Some of these critical factors are put forward below, and include items such as whether you have the right kind of support and resources to follow your project through from beginning to end.

Addressing the critical factors for success of the project:

Do you have...

- ☐ Senior staff support for consulting with the public online?
- ☐ Council support for consulting with the public online?
- ☐ Stakeholders and/or citizen groups who have access to and regularly use online tools?
- ☐ Access to the internet without firewalls (e.g., blocked access to social media sites)?

Assessing your internal capacity:

Do you have... Points:	2	4	6	8	10	
• Access to reliable internet at work?	Slow dial-up	Somewhere in between			Reliable High speed	
• Someone responsible for regularly updating your website? (Answer "2" if this work is contracted out)	Off side of someone's desk	Part-time	Full-time	Several people	Whole department	
• Someone responsible for the technical know-how (IT) in your municipality? (Answer "2" if this work is contracted out)	Off side of someone's desk	Part-time	Full-time	Several people	Whole department	
• Someone responsible for content and message creation (communications) in your municipality? (Answer "2" if this work is contracted out)	Off side of someone's desk	Part-time	Full-time	Several people	Whole department	
• Someone currently managing online engagement and/or who already knows about online tools?	Off side of someone's desk	Part-time	Full-time	Several people	Whole department	**GRAND TOTAL**
TOTAL OF RATING SCORES						

Circle the appropriate box on each row and score your capacity in each column, then find the grand total of your rating scores.

If total is in the following range	**Select this level of digital engagement capacity**
> 35	High Capacity
27-35	Medium Capacity
< 27	Low Capacity

Note: Consider the level of resources you have available before you finalize your recommendation. In some cases, you may choose a lower level of input than the initial score would suggest if your municipality cannot afford to do more. Remember, these figures only provide a rough guide. Your good judgement is more important than the numbers.

Resource 10: Digital engagement terms of use and privacy statements

Local governments define the ground rules for participating online in three ways:

1. Employee Codes of Conduct
2. Website and/or Social Media Terms of Use for the public on municipal accounts
3. Freedom of Information Policies / Privacy Statements for the public on municipal accounts

Employee Codes of Conduct

Codes of Conducts refer to how your employees use social media. Codes of Conduct should cover:

1. Employee use of social media for official use (ie. Twitter on behalf of your organization);
2. Employee use for professional interests (ie. Employee uses social media as a job duty); and,
3. Employee use for personal interests (ie. Employee blog of Facebook not related to work).

A challenge is that all three areas tend to overlap; for example, an employee may use his or her personal Facebook account to update your organization's official Facebook Page. So, your employee code of conduct should provide guidelines in all three areas.

Employee Codes of Conduct tend to:

1. Identify the purpose, scope, and definitions of the policy;
2. Identify guidelines or standards of behaviour that should be followed to meet the policy;
3. Identify responsibilities for staff and management; and,
4. Identify reporting mechanisms and consequences for not following the policy.
5. Some policies also outline the intended outcomes and rationale of the policy.

The guidelines and standards often explain:

- What a department should do to begin using social media
- Who in the organization can access / is authorized to use social media
- Who approves social media use and the level of detail of approvals (ie. Approval for use in general or message-by-message approval)
- What kind of interaction and content is permitted on social media networks, including use of municipal logos and graphics, type of language (ie. not using profanity, hate speech). However, to keep Codes of Conduct brief, many jurisdictions refer to their other policies that outline behaviour, such as appropriate speech.
- Records keeping policies.

Example Codes of Conduct:

- Government of British Columbia:
  - Policy Summary No. 33: Use of Social Media in the B.C. Public Service
- Government of Nova Scotia:
  - Government Social Media Policy
  - Social Media Terms of Use Guidelines for Employees
- Orange County, CA:
  - County Social Media Use Policy and Procedure SM-001
- Various Organizations
  - http://socialmediagovernance.com/policies.php

Terms of use

Terms of Use refer to how the public interacts with your website and social media presence. It gives users of your website and other online accounts a clear description of expected and acceptable behaviour and what the consequences of improper participation are. Terms of Use provide the basis for deleting hateful or spam comments, as well as banning problem users.

Example Terms of Use:

- Government of Alberta
  - Government of Alberta Facebook Terms of Use
  - Your Alberta Blog: Comment and Trackback Policy
  - Government of Alberta's Flickr Photostream Policy
- Government of British Columbia:
  - B.C. Ministry of Transportation & Infrastructure Facebook Terms of Use
  - Data BC Blog Terms of Use
  - Data BC Blog Moderation Policy
- New York City
  - Social Media Policy
- Government of Massachusetts
  - Governor's Office Social Media Usage and Policies

Freedom of Information / Privacy statements

Freedom of Information and Privacy statements are important, because they describe data retention policies and practices, as well as security considerations, to your users. When setting up a municipal account on a third-party website, such as Facebook, it is important to highlight for your users what that organization's data retention policies are as well.

Example Freedom of Information / Privacy statements:

- Government of Alberta
- Government of Nova Scotia
- Government of British Columbia
- City of Nanaimo Privacy Policy

Resource 11: Choosing digital engagement tools (worksheet)

Digital Engagement Project Name:

Involving your Community of Interest Online. Please refer to Resource 5.

1. **Participants:** Who are your communities of interest that you want to engage? Based on the listening you have already done, which digital tools do your communities of interest already use?

Thinking about Digital Participation

2. **Purpose**: What kind of information do you want to solicit from participants? (You can ask them to consider options, brainstorm new ideas, give feedback on programs, reconcile tradeoffs, identify priorities, etc.)

3. **Timing:** Will the engagement be one time, take place over a number of weeks, or be on-going? What happens at each stage (start, middle, end)? Most project-based online discussion processes best run for four to eight weeks, but community-building is longer term.

4. **Methods:** Will the engagement be face-to-face, completely digital, or a mixture of both? How might these approaches complement one another?

Once you have answered the questions above and assessed whether you have low, medium, or high capacity for digital engagement, use the tables starting on page 3-27 to help you select appropriate digital engagement tools.

Choosing Your Tools

5. **Tactics and Tools:** What types of digital activities (if any) will engage your target participants and achieve your engagement goals? Offering a variety of activities can increase the amount and diversity of participation. Which tools might help you engage people in this way?

    - For busy people who would prefer low, broad engagement (i.e. click a button)

- For people with medium time and interest (i.e. explore information and respond)

- For people who would prefer high, deep engagement (i.e. write and discuss)

6. **Collaboration**: Will people participate simultaneously or at their own place? Will the tasks be group-oriented or completed by individuals?

Implementation Planning

7. **Skills**: What skills do you already have in your organization to achieve this project? What skills do you need to develop or bring in from elsewhere?

8. **Policy**: Are there any key policies that need to be developed or updated to ensure the success of your project?

9. **Support**: Who are your project champions? What will help get senior managers and/or elected officials on board?

Resource 12: Additional digital tool "how-to"s

The following resource will provide a basic guide to account set-up and tool tips for the following digital tools:

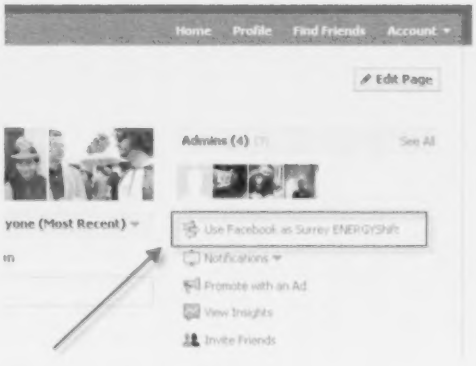
- Facebook Page
- Twitter
- Bit.ly (URL shortner for Twitter)
- Flikr
- YouTube
- LinkedIn
- Quora
- Online Ads
- Blogging
- Mobile Tools
- Widgets and Plugins

Facebook Page

Signing up for Facebook only takes minutes. To set up an account for your municipality, set up a municipal Facebook Page rather than a Facebook account because Facebook Pages are visible to everyone on the internet – even those without Facebook. Also, with Facebook Pages, everyone on Facebook can connect to Pages by becoming a fan. This lets residents receive your updates in their News Feed. Another benefit is that you can select many people to administer the page, meaning that your organization's page is not solely linked to your personal Facebook profile.

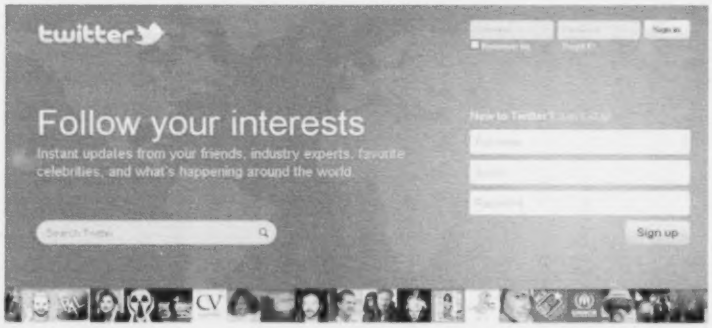
You can still create a Facebook Page if you don't have a Facebook account. Go to http://www.facebook.com/pages/create.php. When prompted, select "I do not have a Facebook account" and just enter your email address and date of birth.

Once you have set up a Facebook Page for your municipality, you can invite additional people to have administrator roles on the Facebook Page. All Facebook Page administrators are able to reply to make notes, upload photos, create wall posts, reply to wall posts, send messages, and perform other actions using Facebook Page's name. Your staff are protected because the names of Page administrators are hidden.
If you have both a personal account and a municipal Facebook page, you can interact on Facebook using your Facebook Page's name rather than your personal account by clicking the "Use Facebook as..." link on your Page.



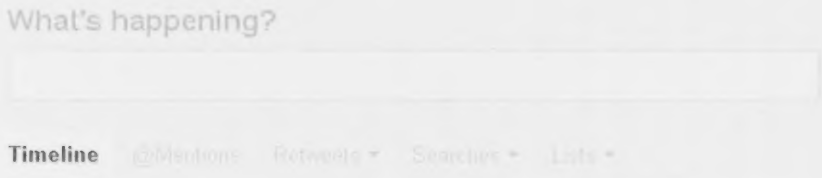
Facebook is a social networking platform, so the next step is to connect with people. Once you have logged into your new Facebook account, you can find people you know by searching for them, syncing your email address book with Facebook temporarily, or by filling in details of your profile.

Twitter


twitter
Follow your interests
Instant updates from your friends, industry experts, favorite celebrities, and what's happening around the world.
Sign up

Signing up for Twitter is easy. You just need to submit a name, email address, and password to get going. Once your account is set up, you can upload your photo or logo and change the Twitter page display settings to match your branding colours and style.

Unlike Facebook, it is completely acceptable to create a shared account using your municipality's name. You may consider creating a few Twitter accounts for various departments in your municipality if your staff have the capacity to engage with the public over Twitter. Social media management suites, like HootSuite and Seesmic, can help you manage multiple accounts or multiple people using one account.



When you log into Twitter, you can do a couple of activities right from the "What's happening?" bar.

- **@Reply:** send a public message to another Twitter user by using "@" in front of the username
- **@Mention:** mention a Twitter user in a tweet using "@" in front of their username. If you wonder why someone mentioned you it a tweet, it could be to:
    - Ask questions about your organization
    - Ask for help with something
    - Give feedback, complaints, and compliments
- **Direct Messages (DM):** send a private message to a Twitter user by using "d @" in front of their username. When one user deletes the message from his/her inbox, it is deleted from the other user's inbox, too. You can only direct message people who are following you.
- **Retweets (RTs):** Twitter's equivalent of a forward or 'Me Too!' or Facebook's Like button. You can retweet by clicking a retweet button on a Twitter client, or you can copy and paste someone else's tweet and post it from your account. Conventionally, Twitter users add "RT" to the beginning of the post and @Mention the user who originally made the tweet. Sometimes you'll see "HT" instead, which means "hat tip" or "heard through."
- **#Hashtags:** Hashtags, which are a reference code on Twitter, are an all-around useful tool. Mostly, people use hashtags to talk about a topic or event. Since you can search by hashtag on Twitter and many other sites, you can find other people who are at the same event or are writing about the same topic. Help your residents find out what is going on in your community by ending your Tweets with #yourcommunityname. Hashtags can also be used to filter Tweets. For example, if you want to use Twitter to update your Facebook profile status, with certain Facebook apps, you can use #fb to just send those tweets to Facebook.
- **Lists:** If you follow a lot of people, you can sort them into lists.

Shortening URLs

Because Twitter has a 140 character limit, many users use URL shortening applications. They have a number of benefits:

- Avoid broken links
- Customizable addresses
- Track click-throughs with bit.ly

However, because URL shorteners disguise the actual address of a website, some people are hesitant to click the link. If you introduce your link first in your tweet, people will be more comfortable clicking it. Generally, Twitter users understand that there is limited space to tweet links, so they will click on shortened URLs. Using shortened URLs on other sites, such as Facebook or on webpages is much less popular.

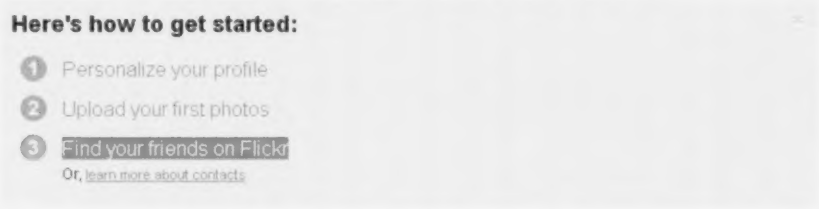
To use a URL shortener, just paste in the web address for something into the box and click the "Shorten" button. Now you can copy and paste the shortened URL. Common URL Shorteners:

- http://bit.ly
- http://tiny.cc
- http://tinyurl.com
- http://goog.le

Flickr

Flickr is an online photo hosting, management, and sharing tool. To create a Flickr account, you need to create a Yahoo account which requires your name, gender, birthday, postal code, a username, password, and secret questions. You can also use an existing Google or Facebook account to create a Flickr account.

Once you've made an account you can add more information to your profile, upload photos, and sort photos into albums.


Here's how to get started:
1 Personalize your profile
2 Upload your first photos
3 Find your friends on Flickr
Or, learn more about contacts

You can upload photos using an online form, a mobile application, or by downloading the Uploadr. The Uploadr also lets you pick each photo's album, privacy settings, and copyright license.

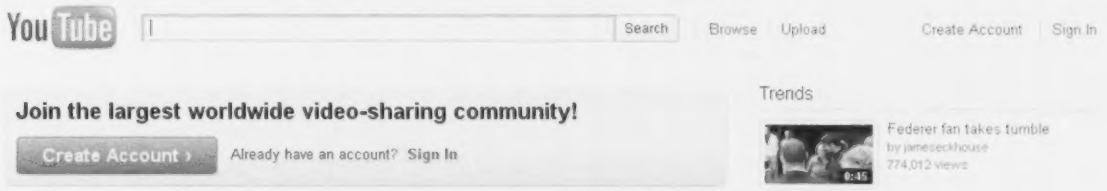
Upload to Flickr
You've used 0% of your 300 MB photo limit and 0 of your 2 video limit this month. Upgrade?
Choose photos and videos NEW
Learn more
Uploading Tools
We have desktop software available for Windows & Mac to help you get your photos and videos on to Flickr quickly and efficiently.
Check out the Flickr Tools page for more information and downloads.
PSST - Looking for our basic Uploader?

For more information on Flickr, take the Flickr tour: http://www.flickr.com/tour/#section=welcome

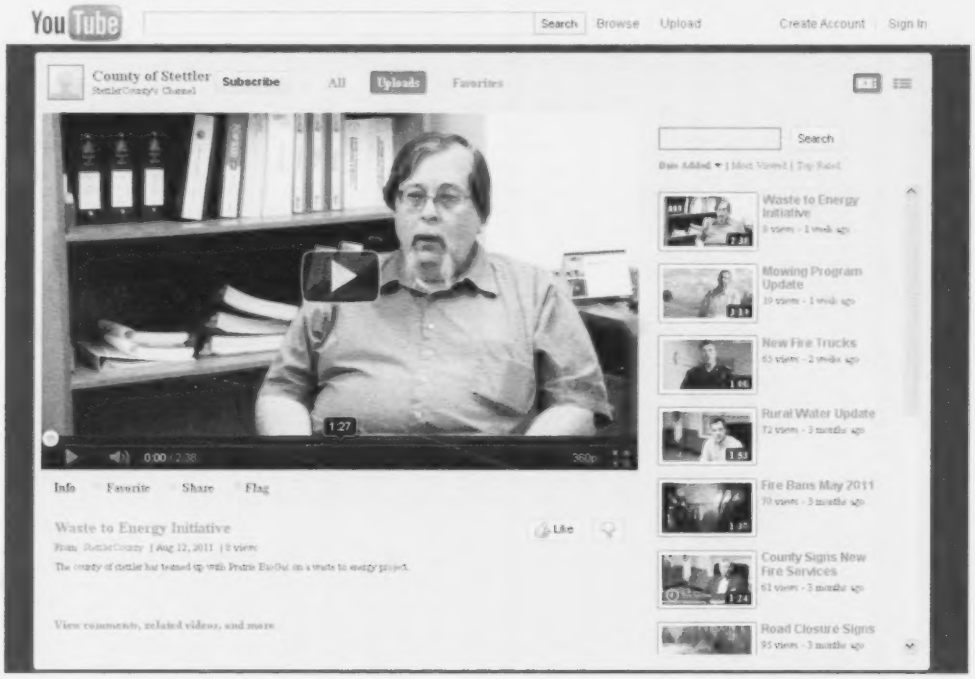
YouTube

YouTube is a video sharing site. To create an account, just click on the button at the top of the page.

To create an account, you need to supply an email address, username, location, birthday, and gender. You can also link your YouTube account to your Google account, if you have one already.



Once you've made an account you can upload videos and make a video channel. Video channels let you put all of your uploaded videos in one place and brand your channel page with themes and colours.



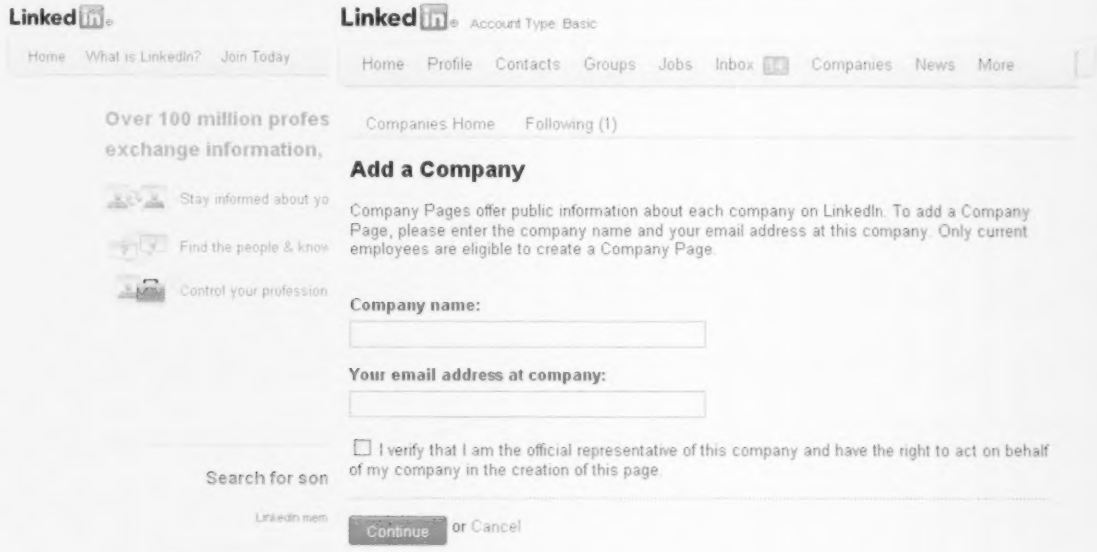
For tips for inserting video "widgets" into a website, see Widgets and Plugins at the end of this resource.

LinkedIn

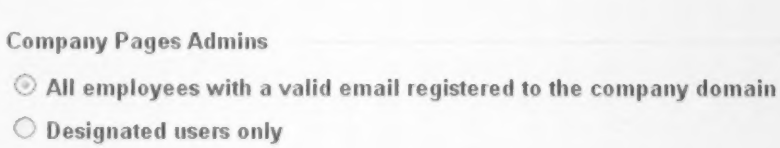
LinkedIn is a professionally-oriented social networking site. Its power for municipalities is two-fold:

- Establishing reputation as being knowledgeable in a particular area
- Connecting to peers in other organizations or municipalities

Signing up for LinkedIn is easy. You just need to give a name, email address, and password to join.


LinkedIn
Home What is LinkedIn? Join Today
Over 100 million profes
exchange information,
Stay informed about yo
Find the people & know
Control your profession
Search for son
LinkedIn mem
LinkedIn Account Type: Basic
Home Profile Contacts Groups Jobs Inbox Companies News More
Companies Home Following (1)
Add a Company
Company Pages offer public information about each company on LinkedIn. To add a Company Page, please enter the company name and your email address at this company. Only current employees are eligible to create a Company Page.
Company name:
Your email address at company:
I verify that I am the official representative of this company and have the right to act on behalf of my company in the creation of this page.
Continue or Cancel

Once you have create a LinkedIn account, you can create a profile for your municipality. Navigate to http://www.linkedin.com/companies?didentcompy and enter your company name and your email address. This lets LinkedIn know that you are a current employee of this company and that your company doesn't already have a profile. Once your email has been verified, you can provide basic information about your company including your municipality's name, website, description, number of employees, and location.



Like Facebook, you do not have to worry about losing access to your municipality's account if someone leaves your organization. When you're setting up a LinkedIn company, you can choose that anyone with an email address from your organization can administer the company profile. Or, you can designate multiple people to act as administrators.

To establish or improve your organization's reputation in a particular area, you can participate in LinkedIn Answers and Group Discussions. LinkedIn Answers is a place where you can showcase your expertise, explain a case study, offer or ask for resources, and give tips and advice. Don't forget to link to your organization's website to increase its exposure.

Group discussions are a way to meet, interact with, and collaborate with people who are interested in the same topic.

Online Ads

Online ads are quite sophisticated, able to reach a very targeted group of people.

Google AdWords

Google Ads is a keyword-based advertising system, where you pick specific words that are relevant to your organization or engagement process, linking the ad to your online presence. The ads appear on Google searches when someone searches for one of your keywords. The costs for ads change depending on how popular a keyword is. But, you can set an overall advertising budget and only pay for ads that people click on.

Facebook Ads

Facebook Ads appear in the website sidebar when people are browsing Facebook. They can target certain geographical areas and specific demographics.

Blogging

Blogging matters for three reasons:

1. Chances are your municipal website has a blog, and if not, it will when it is created or redesigned
2. People are writing about you or issues relevant to you on other blogs
3. Blogs are widely read online, and forming partnerships with influential bloggers can get your message out there.

If your organization has a blog it could be based on a variety of software platforms. Open-source platforms include Wordpress and Movable Type. Other organizations have custom-build or proprietary platforms. As a result, the process of blogging changes from platform to platform. Some organizations have just one blogger, whether it is a specific person or a "corporate voice." Other organizations have a variety of bloggers.

When monitoring other people's blogs, look for what people are saying about your organization or digital engagement campaign:

- What do the blog articles say? Do you need to respond to the article in a comment or connect with the author?
- What do the blog comments say? Do you need to participate in the comment dialogue?
- Does the blog link to you? If the blog references your organization or content, you may want it to link back to your website. If not, don't be afraid to contact the blog author and ask if they

would mind linking to you. Note that you may want to exercise discretion on requesting links back to your website, depending on the nature and source of the content.

You can also "guest post" on other people's blogs, or ask them to guest post on yours. Someone who guests posts writes for a blog temporarily. Guest posting is a great way to reach out to a new audience.

When blogging, remember to keep your posts consistent, brief, interesting to read, and worth sharing.

- **Consistent:** develop a schedule for posting blog updates and stick to it! Popular entertainment sites and topic blogs tend to blog a few times a day. Posting a once a week or a few times a month is also fine, as long as your updates are consistent.
- **Brief:** Posts that are about 200-300 words take about 90 seconds to read, and that is about the amount of time that the average blog reader spends on a post. However, it doesn't hurt to mix up your posts and have some longer ones every once in a while.
- **Interesting to read and worth sharing:**
    - Think about your audience – what would they find interesting to read?
    - Use an interesting title that picks out some key words from your post. This will help the post rank higher in search engines.
    - Use media like photos and videos
    - Write original content, as it is more likely to be shared and syndicated by other blogs and news sites
    - Write "Top 10" or "How to" posts, because they are useful and fun
    - Interview someone

Other important blogging tips:

- **Engage with your readers in the comments**. If your blog is new or has few comments, you may need to "seed" the conversation by getting friends and colleagues to post comments. Once your readers realize that your comments area is a friendly and helpful place, they will be more likely to comment. Don't forget to thank people for their participation.
- **Share your blog post**. Share a link to your blog post on Twitter, LinkedIn, and Facebook. Some blog software will automatically share links for you; however, it is better to have a slightly different message and delivery style for your blog post on each of these platforms. Don't forget to add social sharing buttons on your blog posts. The method to do this varies by blog software. You can also mail email digests of your blog posts with some blogging software.
- **Mention your blog offline**. Put a link to your blog on promotional material and remind people at events or meetings to visit your blog.
- **Build relationships with other blogs**. Comment on other blogs and link back to yours (only if you have a relevant link). Building relationships with other bloggers is a great way to spread your message.
- **Use "permalinks**." Permalinks are permanent links that have the blog title and category in the link address. This helps search engines find your post and people decide whether they should click the link. Hypothetical example: http://www.mysite.ca/planning/10_tips_successful_open_house.htm
- **Link to other relevant posts you have written.** If your reader reaches the end of a post, he or she may be interested in reading other similar posts.

Mobile Tools

Mobile tools are online applications that you can access from a mobile phone. Advantages of using mobile tools include:

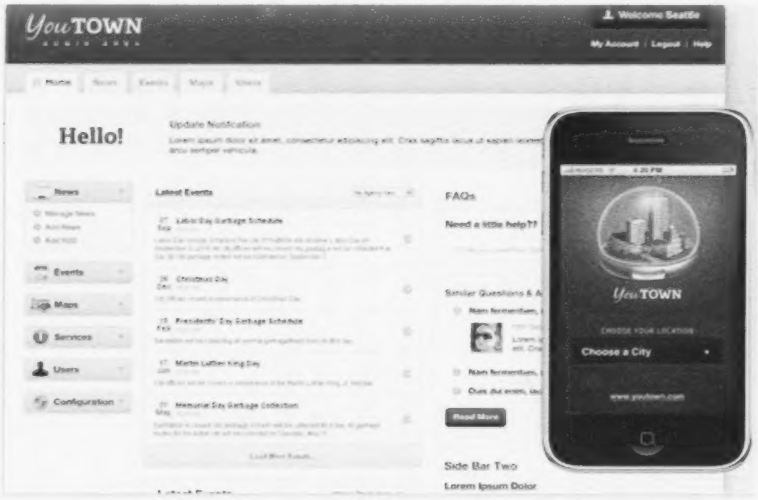
- Phone is always with you, always on

- Geo-location engagement and tracking allows for personalization and new data opportunities
- Mobile tools scale well, but engagement can be superficial (especially with text messaging)
- Free tools available
- Great for connecting with some hard-to-reach demographics

Example Mobile Tools

- **YouTown** - functions as a platform that allows governments to publish news, maps, events, and services to the smart-phones of citizens, so an agency can go mobile without a long app development process.
- **SayZu** – uses text messaging, Twitter, Facebook, RSS, and blog searching to create word clouds, live audience polls, and comment feeds
- **Citizen Request Tracker, See Click Fix** – iPhone app for non-emergency request and reporting

Facebook, Twitter, YouTube, Flickr, and SurveyGizmo all have mobile applications. Some websites have mobile versions. If you have a WordPress website, it is easy to install a plugin that optimizes your website for mobile phones.



Widgets and Plugins

Widgets are code snippets that can be added to any website that help you link to your social networking profiles on your corporate website. To put a widget on your website, you select certain settings to set up a widget, and then the widget website will give you HTML code. Then, you paste the HTML code into your website where you'd like the widget to appear.

Find us on Facebook
Facebook Platform
Like
Facebook Platform Video site Metacafe moved the Like button above the fold on their site and tripled the number of daily likes and doubled their referral traffic from Facebook. What have you learned from Like button placement on your own site?
How Metacafe tripled likes, doubled referral traffic
www.scribd.com
Scribd is the world's largest social reading and publishing site.
8 minutes ago
Facebook Platform Tune in to Facebook Live (http://on.fb.me/facebookhq) today at 10 AM PT / 1 PM ET for a discussion about the evolution of the Like Button and how it has spread across the web.
Facebook Live
www.facebook.com
2,045,060 people like Facebook Platform.

Facebook Fan Box

The Facebook Fan Box is a widget that you can add onto a website just by filling in details like:

- URL of your Facebook Page
- Fan Box width
- Color Scheme
- Whether or not to show photos of your fans
- Border colour
- Whether or not to show the page wall stream

While most websites just offer a link to their Facebook page, having the Facebook Fan Box makes it easier for people to Like your page, see your Facebook updates, and see whether any of their friends also Like your page.

Twitter Feed

Very similar to the Facebook Fan Box, this widget from Twitter lets you display your Twitter feed on a website. You can customize its appearance, size, and other display settings.

Twitter
twitter
#Photos on Twitter: taking flight http://t.co/qb3x26r
20 minutes ago · reply · retweet · favorite
The catchy song from our video is called "Sydney (I'll Come Running)" by @BrettDennen. Watch it again (and again) here: http://t.co/Grvmjfw
23 hours ago · reply · retweet · favorite
Today we're launching a new #search and #photos experience http://t.co/WYZItpo
yesterday · reply · retweet · favorite
Introducing the Follow Button: http://t.co/BBQkuXE
yesterday · reply · retweet · favorite
twitter
Join the conversation

Twitter also offers widgets that display tweets from all over twitter, based on search terms, a particular user's favourite tweets, or a user's lists.

Twitter Widget for Facebook

The Twitter Facebook application integrates Facebook and Twitter by updating your Facebook status with your tweets.

Selective Tweets is another Facebook application that lets you update your Facebook status by tweeting, but it only puts tweets on Facebook that have the #fb hashtag.

Involver is a series of Facebook applications that let you add tabs to your Facebook Page for Twitter, RSS feeds, YouTube channel, Flickr photos, Scribd documents, or a static HTML page.

YouTube and Vimeo Video

All YouTube and Vimeo videos come with an embed code that let you post the video anywhere where you can edit HTML code. If you watch a YouTube Video on YouTube, click the "Share" button and then "Embed" to get the embed code.

If watching a Vimeo video or an embedded YouTube video, you can look for the "Share" or "Embed" link on the video itself or wait for the video to end and see the embed code. Or, you can right click on a YouTube video and click "Copy Embed HTML."

Vodpod Video Channel

Vodpod is a website where you can collect videos from anywhere on the internet and add them to your account to make a channel (unlike YouTube, where your channel is videos that you upload). The Vodpod widget lets you display videos from your Vodpod account.

Plugins are website software-specific applications that make your website more social. They vary depending on the software platform that your website is based on, but are quite well-supported and widely available on Wordpress, Drupal, and Joomla! platforms.

Pulling it all together

There are a number of ways that you can cut down on time spent creating content for and monitoring social media sites.

1. **Use RSS Feeds:** RSS feeds let you subscribe to information from almost any source. You can subscribe to blogs, Twitter mentions or hashtags, Google Alerts, LinkedIn Answer categories, Quora question topics, for example. Just look for the RSS icon.

2. **Use HootSuite or TweetDeck:** These applications let you save searches and respond to people without having to log into Facebook or Twitter.

3. **Use Facebook Applications:** Use Facebook applications like Involver to bring in your YouTube, Flickr, and Twitter accounts right onto your Facebook Page.

Resource 13: Supplementary training materials

What is the best way? (Worksheet)

1. Which case study are you going to discuss (and which host municipality)?

2. Is the decision defined in a way that leads to open discussion, and unbiased selection of the best option? If not, re-state the decision.

3. Is there a good match between the resources (people, money, rooms, etc.) and the process we are proposing? If not, how can you adjust the resources or the process so that they are well matched?

4. What are the best ways to identify the "communities of interest", inform them on the issues, and engage their participation?

5. What factors will have the most impact on the level of satisfaction with the input process?

List of challenges for group discussion

Challenge A - At least two council members are suspicious of the process and have already indicated their concerns to a few citizens.

Challenge B - Council has set aside 45 minutes for the public hearing, but the coordinator feels it will take twice that long.

Challenge C - A few of the "communities of interest" have not shown up for the last few public issues, but individuals from these communities have expressed concerns privately to council members.

Challenge D - Citizens are having trouble understanding why the decision is needed. The issue seems too technical for them.

Challenge E - Three individuals often dominate the public discussion and others are becoming frustrated.

Challenge F - There is a perception that the mayor "already has her mind made up" about this issue and that the public input process is a waste of time.

Challenge G - Attendance at public meetings is very low.

Challenge H - One media outlet has reported in a manner that is incorrect—in fact, they have presented a view that appears to be biased against the project.

Challenge I - .....

.....

Challenge J - .....

.....

Challenge K - .....

.....

Challenge L - .....

.....

Public input case studies

A. Waste Management Facility

Gleason County is running out of room in their landfill facility. The County has experienced considerable growth in the past five years, and a new facility is needed. Five years ago, council attempted to prepare for this moment, but the site that was chosen was so unacceptable to surrounding residents that the matter became an election issue. The next council didn't want to touch the issue. Now this council has to find a solution. A consultant has been quietly retained and has informed administration that there are three suitable sites in the County.

B. Bursting at the Seams

The Town of Ida has been experiencing a boom for the last two years. This has been great for the tax base and for local business. However, there is not enough commercial land available in the downtown commercial district, and if the town does not expand the available commercial land, some businesses will locate elsewhere.

Downtown is surrounded by established neighbourhoods. Town councillors are well aware that neighbouring residents are concerned about commercial expansion.

C. Party!

The Town of Glory Bee is blessed with a great location that has made it a tourist destination. The tourism industry is a major player in town, and the last town council amended the commercial zone to allow a wider range of uses. Now, one of the motel owners is proposing to develop a nightclub. This use is allowed within the amended zoning requirements, but it is opposed by many citizens. The citizens indicate that no one asked them about this kind of land use and that is "completely inappropriate".

D. Care Home

Two years ago, a new senior's centre was developed in Frog River. Now, the Salvation Army has applied to convert the former senior's centre into a care facility for persons struggling with mental illness. They have applied for a development permit because they plan to renovate and increase the size of the building. The centre is across the street from some of the nicest homes in town, and next to a playground. Two of the housewives that live nearby are well known to the town administrator because they take a very active interest in any new developments.

E. Industry and Residential

The City of Carville has an old industrial area that has become an increasing source of complaints from nearby residents. The industrial area is near the outskirts of the city and is used mainly for storage and staging facilities. Over the past ten years, it has been surrounded by two residential neighbourhoods. The industrial area is now a constant source of complaint. The nearby residents think that the storage areas are an eye-sore. Administration thinks that if screening were required at the industrial sites, this would mitigate the problem. Industrial landowners are opposed to this idea—they say that it is an unwarranted expense, imposed on them "after the fact".

F. A New Boat Launch

The Town of Chadwick is blessed with a beautiful river. It has been a constant challenge, though, to keep the river attractive but still accessible. The Town has decided to improve the boat launch to provide better access to the river for recreational users and for outfitters (who use the crowded parking lot as a staging area). The new site will have more parking and will provide safer access to the river. The boat launch is located across the street from a residential area.

G. New Industry Comes to Jackfish County

After three years of effort, Jackfish County is the benefactor of not one but two announcements that major industrial facilities plan to locate there. One of the industrial proponents has been quietly purchasing land. Councillors are delighted because new industry will increase the tax base, and the population. A number of citizens, however, are worried. They feel their rural way of life is at risk.

H. Oh, *That* High Density Zone

When Sherman Heights was developed as a residential area three years ago, the town planner had the foresight to allow an area for higher density development. Now, a developer has purchased the property and is proposing to build three buildings that will contain a total of 80 apartments.

People who bought homes near the site are outraged. They say that this development will block their view of the farmland to the east and that they have heard bad things about the developer.

I. Is It Good News or Bad News

The complaint about the retail sector has always been that they charge too much. People have travelled 120 kilometres to save in the "big box" stores. Well, the answer is at hand. Now a big box store wants to open locally. But many residents don't think that's good news. They are concerned that the new entrant will destroy the character of the town. The application is being submitted for council review. No zoning change is required, but councillors are deluged with both positive and negative comments. If only there had been this much interest in the municipal development plan...

J. We Need More Gravel, Don't We?

Swanson Gravel owns several acres of land along the river. They have a gravel pit at the south end of their land. They have notified the M.D. that they plan to open a new pit at the north end of their property. Administration is aware that a new company—A&J Ltd.—has enquired about accessing gravel on lands south of Swanson's property.

There have been several complaints in the past about dust and noise related to Swanson's operations.

K. A Perfect Site

The M.D. of Kalmoss is planning to attract industrial growth from the increase in oil and gas services operating in the area. They have a site that would be excellent for industrial lots. Access is good, and servicing would not be difficult. The only concern that has crossed the mind of the area councillor is that there are two "country estate" subdivisions located not far from the site. Many of the residents would have an unobstructed view of the industrial buildings.

L. Ramps and Rails

The Downtown Business Association in Hollyhock has complained that teens on skateboards are a nuisance, and they want something done about it. The Town has posted signs restricting the boarders, but it has not alleviated the problem.

The Mayor has proposed that a skateboard park could be built in the middle of Roselyn Park. The land is already zoned for recreational facilities, and the Downtown Business Association will contribute to the construction cost.

Several neighbours who look out at the park (about 300 metres away) complained when they heard a rumour of a skateboard facility. They think that skateboards are undesirable to have near their neighbourhood.

M. Green Power

Marcy Semmler's family and several friends moved to the town of Marville three years ago because they wanted to return to simpler living. Six families bought adjoining lots in the new subdivision next to the marsh, and they soon had an impact on the town. They turned their yards into small farms and attended meetings to promote green, pesticide-free living.

Now they have a new idea. They have noticed the amount of wind that blows across the marsh flats and they want to erect three wind towers to produce 20 KW of wind energy. They want the town to provide a lease on the land for a nominal fee and they are willing to invest their own money in the towers.

Several residents of the town think this may be an important step for the future of Marville. They imagine a gradual conversion to green energy sources, and they feel that this will help revitalize interest in their town. A vocal opposition is growing, however. Council is reviewing a proposal from Semmler's newly formed non-profit corporation. Councillors realize they need something of this sort, but are concerned about aspects of this proposal. Mayor Neufeldt asks the town manager for advice: how should they proceed?

N. Bus or Bust?

Crowfield is the sixth-fastest growing suburban community in the province. What used to be a rural town is now a classic "bedroom community". Most of the people commute into the city during the week for their jobs and want a bus service.

Council is reviewing a transit plan that shows that bus service will cost the town a significant amount of money over the next five years, with significant initial costs. Council feels the pressure to deliver a bus service but knows that ratepayers won't like the tax increase this is going to require.

O. Affordable Housing Has a Price

Cranmeer is a great place to live and work. However, the cost of housing has risen 90% in three years. Since it is a tourist town, many of the residents do not make high salaries...but businesses critically need the service workers to stay in town. There is huge pressure for affordable housing. Council has already attempted to require developers to include affordable housing in any new development that has more than 20 households. Developers indicated they would voluntarily comply, but this has not solved the problem.

Council has an option to use a federal infrastructure grant to develop affordable housing instead of upgrading the troublesome intersection at Lexington. However, developers are opposed to this intervention in the market and the town's many affluent commuters are opposed to the delay in the intersection upgrade.

Handout

Community Consultation for Developers

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COMMUNITY CONSULTATION

for developers

This guide provides suggestions to help developers organize and implement a process to consult with communities. If you are reading this guide, we assume you are proposing a plan amendment and/or change in land use to a municipal council in Alberta.

1. The value of public input

When a municipality or municipal councillors review a proposed plan amendment or a proposed land use change, they must consider the expectations and perceptions of the surrounding community that may be affected by the change. When you have done an effective job of gathering public input, you make it much less likely that worried and uninformed constituents are calling their councillor to express concern about your project. You also help the councillors feel confident about their decisions regarding your application, and increase the likelihood that Council will support your project (assuming the project has merit that is obvious to councillors and their constituents).

Public input is not an "add-on" to your project. Instead, it is an integral part of the process of making application to the municipality. Most developers learn sooner or later that public input improves their project and hastens the approvals required before construction can begin.

Good relationships with your neighbours, and a good image in the community, will benefit your current project and future projects as well.

2. Communicate before you file your application

Before you submit your application to the municipality, there are some things you can do to help you be successful:

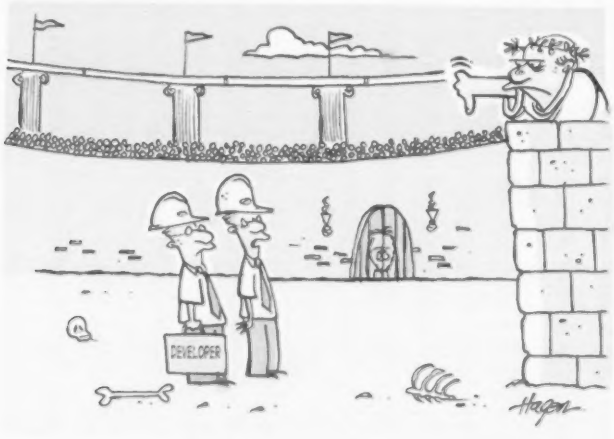
1. Talk with a municipal planner and a municipal councillor to ensure you know any requirements or expectations that may affect decisions about your project. Ask for information about the community and the people most likely to be interested in your project. Ask for any knowledge gained from recent experience in the municipality with similar projects. Ask if there are any spokespersons who have represented the community in discussions of comparable projects.

Tip: Start early. The longer you wait to contact neighbouring landowners, the greater the risk you will have unresolved concerns.

2. Walk through the surrounding community and talk with people. Learn about their perceptions of their community and (if your project is already public knowledge) your project.
3. Contact community spokespersons and get to know them. Learn their perceptions and expectations.

3. Communicate after you file your application

When you make your plan or land use application to the municipality, you may be asked to notify affected citizens (usually surrounding landowners) of your application. If a change in zoning or subdivision is necessary the *Municipal Government Act* requires the municipality to notify affected property owners. This usually requires (a) a sign posted on the property that informs passers-by of your application, (b) a printed notice in the local newspaper, and/or (c) letters sent to adjacent/affected property owners.



PERHAPS WE SHOULD HAVE CONSULTED WITH THEM FIRST.

You can greatly improve the likelihood of gaining Council approval, and community support, if you invest in communication and trust-building from the initial stages of your proposal. In established communities, people are likely to feel vulnerable to the changes they see around them: growth, traffic, density increases, and commercial land uses. Neighbours who know who is "behind" the project, and who feel their questions are being answered and their concerns are being addressed, are less likely to oppose a project and may even actively support it.

Reaching out to the communities around you can only improve your presentation to Council. The following activities are recommended for any development project:

1. Contact community leaders to let them know you would like to meet with them to ensure they are informed about your proposal. Let them know up front what the decisions will include (i.e. be clear about the scope).
2. Make it easy for interested persons to contact you (or your organization).
3. Learn what kind of "meeting" format will work best for people (time, place, length, discussion process).
4. Provide convenient opportunities for people to learn more about your project (i.e. hold meetings, maintain a storefront office, be available at the development site).
5. Return calls and e-mails, and keep people informed of any changes that may interest them.
6. Keep the planner and your local councillor informed about your efforts to stay in touch with the communities and their spokespersons.

In some cases, your proposal will require a significant public outreach effort. Key factors that signal the need for greater effort include the following:

- Scale of development (i.e. larger scale = more communication)
- Change of neighbourhood character (i.e. the proposal changes the scale, aesthetics or character of the neighbourhood)
- Perceived health or safety risk
- Perceived impact on lifestyle (i.e. blocks access to river, blocks view of foothills, brings "strangers" into the areas, includes late night activity)
- Moral issues (e.g. religion, gambling, sexual issues)

Tip: Consider the "48 hour rule." No one should wait more than two days for a response to their question or concern. The sooner the response, the more you will be trusted.

Greater public outreach means you may need to include communication and consultation activities in your project's plan. These include:

- Media relations
- Community outreach (personal communication with community residents)
- Preparation and distribution of informative materials
- Hosting meetings that help people get answers to their questions

4. Plan to document what you hear

While consultation includes many informal conversations, it is important that you have an orderly plan from the outset. Plan to document your efforts to talk to people and the information you gather. At the end of the process, you should be able to produce a record that shows:

1. How you informed interested citizens about your proposal.
2. What opportunities they had to learn more and provide input.
3. How many people attended meetings and/or provided input.
4. What concerns or suggestions people raised.
5. Any adjustments made to your project as a result of what you heard.

This record demonstrates your commitment to good community relations, and will be helpful if later there is a difference of opinion about what was said and what was provided.

If you have taken time to learn about the surrounding communities, it is easier to put together an effective plan. Your plan will help ensure you keep a record of contacts and input received. It will also keep you on track toward the Council decision you are seeking. If you proceed "one step at a time" you may find the process takes longer and you are constantly reacting to new information and requirements.

Planning made simple

Ideally, planning begins with discussions about your project. As you talk to the municipal planner, councillors, and community spokespersons, start assembling a simple consultation plan. This can be done on a few pages, in a few hours. Here are questions you should answer in your plan:

- **What decision are we requesting, and what are its implications for the communities?**
- **Whom should we be notifying?**
- **Whom should we try to get input from?**
- **What input do we require?**
- **How are we intending to gather the input?**
- **What resources and information do we need?**
- **What are our timelines?**
- **What is likely to be controversial—and how should we manage the controversy?**
- **How will we respond to the input we gather, and how will we present the information to the municipality?**
- **What outcomes do we seek from our efforts to involve the public?**

Working with municipal representatives

It is always a good idea to ask municipal representatives for advice about how to proceed. Keep them informed—both the municipal planner (or development officer) and the elected councillor will appreciate your effort to keep them "in the loop."

5. Teamwork

Public input is an integral part of your project and requires teamwork. Several jobs must be done, and it is important to participants that one person does not attempt to do all of those jobs simultaneously. It is critical that there is coordination between your public input activities and your project design and management. You may have to contract people with communications skills to support consultation during the application review period. People involved in the project may bring excessive zeal to a public discussion. If citizens get the impression there is no flexibility regarding the "best" way to do the project, they may feel they are wasting their time talking with your people—and move on to talk to elected officials.

Skills that will be helpful in your project management include:

- Coordination – Someone to ensure all those little "promises" are communicated to everyone
- Facilitation – Someone to run public meetings, or to impartially hear what individuals have to say
- Communication – Someone to develop communication materials and meet with media
- Data keeping – Someone to record all public input

Consider having at least one person support the public input process on a full-time basis. For a brief period of time (usually about a month), there can be many calls and individual contacts to make. After-hours meetings are the norm.

Tip: Advance preparation is the key to good public meetings.

6. Scheduling the public input process

Usually, public input is tied into a specific schedule (for the approval of a project, or for the passage of a bylaw). However, implementing the public input opportunities can be a challenge.

Allow time for delays. The most common sources of delay are listed below:

- Approval of process or of public information
- Production (writing, artwork, printing) of public information
- Appropriate meeting rooms not available
- Research (ensuring accurate information)
- Public notification (media placements) or notification of stakeholders
- Re-drafting proposals after initial public input is received

In most cases, the municipal requirements for planning and development establish a clear process and timeline. However, other issues such as environmental concerns, health and safety, and utility and road considerations can alter time requirements considerably.

It is advised you develop an activity schedule that addresses the following four process stages. Ideally, these stages will be completed before you make formal application (i.e. while you are discussing matters with the planning officer or administrator).

Stage 1: Preparation	▪ Creating your initial plan ▪ Building and training your team ▪ Drafting public information ▪ Making bookings for meetings
Stage 2: Information Exchange	▪ Communicating with affected persons, agencies or neighbourhoods ▪ Gathering preliminary information before formal public meetings ▪ Providing advance information to interested persons or agencies

Stage 3: Comparison of Options	▪ Presenting the analysis of potential choices to interested persons or agencies
	▪ Learning about their perceptions and preferences
	▪ This portion of the process usually involves:
	  ▪ Scheduled and unscheduled meetings
	  ▪ Telephone surveys
	  ▪ Distribution and collection of questionnaires
	  ▪ An interactive website
	▪ Noting and organizing the input received
	▪ Verifying what you have heard and addressing it in your application

Stage 4: Decision and Implementation	• Responding to the input received (possibly by making changes, or providing additional information) • Presenting the preferred option to the municipality in your application • Receiving the municipal decision • Determining what is required for successful implementation • Initiating implementation (note that interested citizens remain interested during this stage)

7. Good communication materials

Good communication materials are an essential part of the public input process. The key to designing good communication materials is to design the communication from the context and perspective of the receiver, rather than the knowledge and expectations of the sender. The key questions to ask are: "What does the receiver want to know?" and "what misconceptions might interfere with our conversation?"

Remember: The receiver may be confused by possibly conflicting "other" messages.

Write "open" information

If the information provided to people appears to "sell" one option solely, or in strong preference to other options, it may be discredited. Similarly, if information favours the perspectives of one community over another, it may become fodder for an argument.

Make the scope of discussion obvious

Be specific about what is "on the table" for discussion. If necessary, point out the boundaries of the discussion.

Keeping it simple

The toughest part of writing public input materials is deciding what to leave out. People will spend very little time reading the material—so be selective about what you need to say. It is often useful to keep the basic message simple, but then add detail and illustrations for the more intrepid reader, and for use in public discussions.

Illustrations are important

A "concept picture" or a process illustration will become a major discussion point. It will attract attention and improve memory of the information. Colour improves attention and memory. However, if four-colour production is too expensive, two-colour production is well worth considering.

Notification and distribution of information

The *Municipal Government Act* specifies a municipality must notify adjacent landowners of applications to change land use or subdivide land. In addition, it is common for municipalities to notify adjacent landowners about property development proposals. Therefore, you will be asked to pay for the cost of this notification as part of your application.

Ideally, everyone potentially interested in providing input to the decision(s) you are considering will be notified, be aware of the coming decision(s), and be aware of the opportunity to provide input. You may choose to notify more parties than is required by provincial legislation. However, this can be challenging–there are a few barriers to consider:

Tip: Building trust is just as important as gaining input. Focus on building good relationships, and plan to keep those relationships as the project proceeds.

1. **Information overload:** Most people receive so much unsolicited information they automatically discard or ignore the majority of it.
2. **Competing messages:** It is easy for people to confuse your message with others.
3. **Distribution costs:** It can be expensive to get information delivered directly to everyone who is interested

The municipality will usually purchase formal notification advertisements in a newspaper. However, you are encouraged to provide additional notification. No notification system is perfect; more than one notification approach is recommended.

Some notification methods that can be used to supplement public notices placed in newspapers:

1. Face-to-face discussion (or telephone discussion)
2. Direct correspondence (including e-mail)
3. Networking with community leaders
4. Presentations at meetings
5. Bulk mail
6. Media release
7. Displays, signs and bulletins
8. Media advertisements

8. Making public meetings enjoyable and effective

Presenting information

People who take the time to attend public meetings should leave those meetings feeling well informed. Here are some guidelines to consider:

1. **Your audience will learn more when you say less**

   The average audience member will be attentive for about 10 minutes (most speakers assume the number is 30 to 40 minutes). Start with the presentation you think you ought to give, then cut it in half.

2. **Few people memorize facts**

   If you attempt to present all the facts before people have a chance to ask questions, you will be disappointed with the level of understanding among participants. It is better for people to be able to ask about the facts as they consider the options being presented. Project staff can help people "find" the facts when they need them. Handouts are important because they provide a reference tool for participants.

3. **All the facts must be available**

   While your presentation must be concise, it is equally important that people have ready access to all the relevant information about your proposal. Remember, your presentation raises awareness; now people are more likely to want to know more. Open access is important.

Tip: The purpose of public meetings is not to "educate" people, it is to help them evaluate choices.

4. **People learn by interacting with staff and information**

   While people politely listen to presentations, their learning rate is relatively low. Learning is much higher when they are talking to others and examining information. People learn by seeing, hearing, touching and smelling. It helps when they are not sitting still for long periods. They usually learn more when conversation is "two-way," not when they are sitting still and listening.

5. **Some methods definitely help people learn**

   The following "embellishments" to a presentation will help people learn information and will increase participant satisfaction:

   - Connect the information to familiar situations or common experiences.
   - Use colour pictures and photographs (especially when they show familiar places or people).
   - Use humour to support key points in the presentation (this is different than telling jokes).
   - Show your own enthusiasm about the topic.
   - Ask others to contribute questions or ideas and pay close attention to what they have to say.
   - Make eye contact and smile.

6. **Other methods should be used with care**

   - Abstract graphics (graphs, maps, process diagrams) can be useful learning tools, if you understand that many participants will have trouble understanding the message encoded in the graphics. It looks crystal clear to you, but it may not make sense to others. You can overcome this difficulty if you use the graphic as a "prop" for your story, not as a self-explanatory learning tool.
   - Technical data is even more difficult for people to understand. Describe what experts have concluded from the data, but leave the data aside for questions. Those who ask questions about the data will be motivated to understand.
   - Case studies or explanations of experiences elsewhere can be useful occasionally, but they must be concise. Note that examples can be misinterpreted, so be cautious about how you link the example to your proposal.

One method should be avoided

Selling one solution as the answer, without reference to other options, raises doubt and resistance. The more enthusiastic you are about one solution, the more energy others will have to oppose you. Things will get worse if you respond defensively to criticism of your idea.

Selecting the meeting format

When you hold your public meeting, you can choose a meeting format based on the topic, the target audience, and your budget. The following section describes the most common meeting formats and provides some advice to help you choose the appropriate format and to implement it well.

Type of Meeting	Advantages	Disadvantages
Storefront or **"over-the-counter:"** allows anyone to drop in and discuss plans "over the counter"	▪ Citizen can choose time to drop in ▪ Citizen gets one-on-one time with project representatives ▪ Great if a small number of citizens have a high interest	▪ Input is often verbal and must be recorded ▪ Relatively time-consuming ▪ Cannot accommodate large numbers ▪ Caution about "busy periods"
Informal "doorway:" small meetings that are informed neighbourhood discussions	▪ Builds trust and familiarity ▪ Gathers in-depth information relatively quickly	▪ May require several meetings to cover all interested parties ▪ Requires skill on the project representatives' part to keep discussion on track and record advice and questions
Advisory committee meetings: invited representatives meet several times to refine and discuss options	▪ Allows time for members to get to know one another and "do their homework" ▪ Builds consensus about detailed recommendations	▪ Committee may not be accepted by all communities ▪ Committees can be construed as "under the table" ▪ Requires major time commitment

Type of Meeting	Advantages	Disadvantages
Round-table meetings: usually less than 20 people and include a formal agenda	▪ Promotes exchange of ideas ▪ Good format for consensus building, if well facilitated	▪ Limited number of participants at each session ▪ Must be well facilitated and recorded ▪ Can be perceived as a technique to "divide and conquer" ▪ Make sure such meetings are not seen as "closed door"
Workshops: participants can "roll up their sleeves" and work together to assess information and create recommendations	▪ Promotes group problem-solving and exchange of ideas ▪ Can lead to creative recommendations	▪ Requires extensive preparation ▪ Must be well facilitated ▪ Requires time commitment from participants
Town hall meetings: larger meetings with a formal agenda and formal presentations	▪ Involves many people at once ▪ Everyone gets to hear what everyone else has to say	▪ Media often attend because meetings can become confrontational ▪ Must be expertly planned and facilitated ▪ "Showboating" at the microphone is a problem
Open house sessions: an opportunity for anyone to drop in, review information, talk to a project representative, and submit their preferences	▪ Allows many people to review information and talk to representatives ▪ People can spend as much, or as little, time as they wish ▪ Non-confrontational format	▪ Will not result in any definitive input unless designed to do so ▪ Does not promote interaction or consensus-building among communities

1. If the decision affects only a few people, then you will naturally use one of the following methods to discuss matters with these people and to gain their input:
   a. Personal meetings (one-on-one, often with you going to them)
   b. Storefront meetings (generally over the counter with one or a few people at a time)
   c. Informal "doorway" meetings (meetings with less than 10 people, usually held in someone's house or business, with no formal agenda)

   All small meeting formats depend on your ability to give the people your attention and to provide credible information in a friendly manner.

2. If the decision affects more than 10 people, then you must choose whether you want to hold a series of meetings that anyone can attend; or whether you want to invite a representative selection of people to address the decision prior to the Council hearing (i.e. invited representatives participating in a committee or a round-table).

Tip: A public input plan makes it much simpler to do a good job.

Options are the basis for productive discussion

When you talk to citizens and municipal representatives about your proposal, try to define more than one way the project could be structured. If there are two or three options to discuss, then the discussion will be more about "which one is better" and less about "take it or leave it." Additionally, if others are encouraged to think about the best way to approach your project, they often come up with very good ideas that will benefit the project.

Based on your early discussions with municipal and neighbourhood representatives, you can likely identify some factors that will most influence their perceptions about the project. These include items such as the following:

- Changes in parking or traffic patterns
- Changes in aesthetics (blocked views, shading, appearance of exteriors, greenery)
- Nuisance factors (noise, dust, odours, rubbish)

It is helpful if you display the options available, and provide comparative information that reflects the factors municipal and neighbourhood representatives are most interested in.

Retirement Facility Criteria	**OPTION 1** 85 suite facility	**OPTION 2** 120 suite facility
Range of services provided		
Green space & landscaping		
Parking arrangements		
Size & location of facility		
Community access to facility		
Construction costs & operating efficiency		

Mitigating development concerns

In many cases, public concern will focus on the disturbances created by a development, rather than the actual intended structure. In these cases, the public discussion usually focuses on mitigation options, rather than development options.

For instance, the discussion may focus on matters such as the following:

- Time of year when construction will occur
- Length of time when traffic will be affected
- Factors affecting noise concerns, such as type of equipment and time of day
- Alternate arrangements for affected households and businesses
- Communication with affected residents
- Safety controls around the site
- Visual barriers
- Landscaping and external appearance

Tip: When the focus is on mitigation of impacts, it is not usually desirable to hold a "town hall" meeting.

Discussions about mitigation work best when they are more personal or informal. Community leaders can play an important role in identifying (and supporting) appropriate mitigation techniques.

9. Conflict and consensus

Although "conflict" sounds like a bad thing, it is a normal and desirable part of the discussion process. You wouldn't be going to all this trouble if you were sure everyone agreed about everything. Good ideas come from the exchange of different points of view. However, you are trying to avoid emotional outbreaks and accusations.

Tip: Emotional confrontation at meetings often results from fear or anxiety. Help people stay calm and reduce the threat they feel—give them back some control.

You do not have to have consensus from affected citizens and landowners about the best way to proceed with your project (although a consensus of support would make the Council decision easy). Your target should be to achieve credible documentation of the preferences and expectations of those affected, and to clearly show how you have responded (in a practical way) to concerns raised.

In many cases, people can live with the new project if (a) their proposals or preferred option is seriously considered (or adopted), or (b) acceptable mitigations, controls or compensations can be assured to address concerns they have in relation to the preferred option.

10. Following through

Never underestimate the amount of work you will have to do after the meetings are over and questionnaires are submitted. Take the time to congratulate your team on what they have achieved, but don't lose momentum.

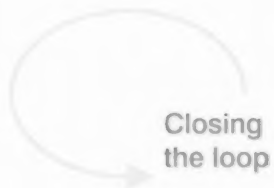
Here are some tasks that typically require your attention after the input is received:

- Thank those who have helped you.
- Keep any promises made; do you need to send out any information?
- Collect and inventory all notes and input in one place.
- Ensure all input received is analyzed and summarized (this may require time editing and refining notes).
- Brief the project team as soon as possible and inform those responsible for the project of any concerns that might affect their planning, design or implementation.
- Inform municipal representatives and elected officials about the public input process and the advice received.
- Provide some information to the interested participants involved in your process. Let them know you appreciate their participation and give them some idea of what you have heard.
- If you have made adjustments in order to make your proposal more satisfactory, make a specific connection between what you heard and the changes you have chosen to make.
- It is a good idea to verify you have interpreted the public input correctly. Ask some (or all) participants to comment on the accuracy of your summary. It is better they make these comments to you than to councillors.

Role of municipal officials

Municipal officials are an important source of information about your project, so keep them well informed. Usually, they will not represent your project publicly, but they may attend public meetings and will often help explain the bylaws or the application process you are working within.

People must be informed about the decision and how their input was used as part of the decision. If an approach is chosen that is different than many people recommended, it is essential they are informed why another option was chosen.



Handout

Citizen's Guide to participation in municipal decision-making

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CITIZEN'S GUIDE

to participation in municipal decision-making

This guide will help you become an active citizen in your municipality. It will provide the essential information you need to be part of the municipal decision process.

1. The value of participation

Municipalities are established to serve people. They become better (and happier) places when people get involved in decisions. Decisions made by your local (municipal) government affect your day-to-day life and deserve your attention. You may be affected by decisions about annual budgets, public transportation, garbage pickup, new building developments or whether the house next door to yours can be enlarged. As a citizen and taxpayer, you have a stake in the outcome of municipal decisions.

There are many opportunities for the public to become involved and take part in decision-making. Municipal officials welcome input from the public; in some cases, they are required by law to seek it. However, the final decision rests with Council.

In some situations, the public will be directly notified and asked to respond (e.g. by completing a survey or attending a meeting). However, in many situations, you must make an effort to become informed and involved. Often, the municipality is not obligated to notify the public personally about an issue or decision process taking place.

Become more proactive in the decisions affecting your municipality. You have the opportunity to help your municipal Council make better decisions and to improve the quality of life in your community.

Tip: There are usually community groups or associations that can help you become familiar with municipal issues and processes. Working together helps to ensure success.

2. How to succeed at public input

If you want to get the best results in return for your effort to participate in municipal decisions, consider the following:

Learn what is going on. Sometimes a little detective work is needed to find out what changes are being considered. Be aware of what is going on around you so you know when public input is being requested or when you can request to give public input. Early enquiries are always a good idea.

Learn about the Decision. Learn what decisions have already been made, and what decisions or parts of decisions remain to be made and will be affected by public input, and what the public input is intended to achieve. Sometimes your input addresses only a part of a decision, and other (and possibly larger) parts may already have been decided and are no longer open for public discussion.

Work with others. There is more power in a group approach. When citizens work together, they are more likely to influence municipal decisions. However, this means you must achieve consensus with others and any differences should be discussed within the group, not with others.

Respect the processes established by municipalities and recognize that staff and councillors may have real practical and legal constraints on what they can do. Municipalities must consider what is good for all.

Be realistic about your goals. Municipal Council must make decisions that consider the needs of all parties concerned, within the zoning established in the municipal development plan. Study the situation and consider your requests carefully. If a developer is acting within the requirements, you may want to discuss possible modifications that would reduce the impact on neighbours (e.g. entry area, parking).

Tip: Be open to compromise. Remember, there are often several perspectives to an issue.

Never underestimate your power as a citizen and member of community organizations to effect change in a positive and calm way.

Other levels of government may sometimes need to be involved in what appears to be a simple municipal matter. You can take the initiative to involve other government officials or take your input to forums set up under provincial or federal legislation.

3. Learn what is going on

Find out about your municipality

Familiarize yourself with the particular ways that your municipality operates. The Government of Alberta's website (www.municipalaffairs.alberta.ca) includes useful information about how municipalities operate.

Your municipality may have a website. If not, look at websites for other municipalities to find out general information that might also apply where you live. For example, the process of development applications is largely set out in the *Municipal Government Act* and applies to all municipalities regardless of size. Larger municipalities such as Edmonton and Calgary have information in printed form

and on their websites which explains the process. The local county or municipal district website may offer information valuable to a summer village resident.

Go to your municipal office or local library and look for brochures about anything connected with the municipality, including procedures, bylaws and dates and times of Council and committee meetings. If you need clarification on a particular aspect, make an appointment to talk with an administrator or call and ask your questions.

PRESS SEVEN IF YOU'RE BECOMING ANNOYED WITH THIS RECORDING, PRESS EIGHT IF YOU HAVE HIGH BLOOD PRESSURE,...
CLICK CLICK CLICK CLICK CLICK

Work together

If you want to get better information about the municipal decisions that may affect your neighbourhood, become part of the "network" of people who are likely to know. These people include:

- Your elected municipal councillor
- The municipal administrator or planner who deals with zoning and planning
- A local community association or non-government organization

It is recommended you attend a Council meeting and see how decisions about zoning, development or services are handled. Introduce yourself to some of the interested citizens, if you do not know them already.

4. Provide input to municipal decisions

Does Council or administration make the decision?

The Municipal Government Act provides guidance about who has the power and responsibility to make various decisions. Only Council can decide to rezone a piece of land, but administrative staff can determine whether or not to issue a development permit. Council makes policy decisions about such things as budget, budget allocation, bylaws, or land use.

There is an exception. Council may have established an area as a "direct control district." These districts have specific requirements that must be met by all proposals (e.g. preservation of historic buildings). In these cases, Council approval is required.

The following table describes three types of municipal decisions, noting where formal public notification is required, and whether formal public input is normally suggested.

Type of Decision	Description and Notification
Council, e.g. bylaw change	A bylaw that must be advertised.
Administrative with a right of appeal, e.g. a development permit that generally conforms to the zoning	Decision made by an administrator or administrative committee. Those affected are notified. Those citizens may appeal to a civic board within an established timeframe.
Administrative without right of appeal, e.g. installation of a new sewer line	Administration has the power to make many decisions about municipal services, signs, construction, etc. These decisions may be advertised if they affect the community (notification is not legally required). Public input may or may not be requested.

When will a municipality inform citizens about a decision or request public input?

Public input is required before a municipality can change certain bylaws, for example, when a road is closed. In this case, the municipality is required by law to formally notify you (the citizen) by advertising or mailing a notice, and to seek public input before a decision is made.

In many other situations, the municipality (usually Council) will decide it needs to gather public input before it makes a decision.

If public input is required by Council, the administration may do one or all of the following:

1. notify citizens (mail, direct contact, media),
2. hold public meetings,
3. request input through a survey.

The earlier you can become involved, the better—especially if municipal staff are not yet able to make plans public. For example, if property is being developed in your area, the plans may be fairly well advanced before there is any legal obligation for the developer or municipality to notify the community or neighbours. If you notice surveyors on a property or roadway that may concern you, call your municipality and ask questions. Sometimes administrative staff may not be able to divulge confidential information (perhaps the developer has not yet made a formal application), but they may then recommend to the developer that some discussion takes place with the community. Also, if you know who is potentially developing a property, you may contact them directly and ask for a meeting to which municipal staff could then be invited.

WHY DID YOU PLANT SO MANY TREES?! TREES ATTRACT DOGS, AND KITTY HATES DOGS!! KITTY WANTS YOU TO CUT DOWN ALL THE TREES!!!
GRAND OPENING OF TREELAND PARK

Council decisions

Decisions by your elected Council can only be made by passing a bylaw or resolution. Once a decision is made in this way, it is very difficult to have it reviewed or changed. You could only do so by persuading councillors to reopen the decision or by challenging the decision in court. It is much better to try to

influence Council's decision by providing input before the bylaw or resolution is passed.

There are different ways to provide input to high level decisions under consideration by a Council:

- In some situations the law requires a municipality to hold a **public hearing** before it makes a decision on a particular issue (e.g., a road closure or land use rezoning bylaw). This would be a **statutory public hearing.** In other situations, a municipality may decide to hold a public hearing because of the nature of the issue. This would be a **non-statutory public hearing.** Public hearings are advertised in the press and may also be noted on a municipal website or by notice in public buildings. If you have a specific interest in the issue, you may receive a mailed notice about the hearing. Some tips about presenting at meetings are provided under item 5, on page 9 of this guide.

Examples of high level municipal decisions:
- Rezoning land
- Adopting an area structure plan
- Adopting an annual budget
- Closing a public roadway
- Privatizing a municipal service

- In larger municipalities, decisions made by Council are often based on information from **committees** of councillors. The committee will review an issue and report to Council with recommendations, so it's best to try to influence those recommendations. Municipalities will each have their own policies as to when members of the public may make presentations (either to Council or to a committee). Find out what these policies are in your area so you do not miss the opportunity to give input to the decision process at the appropriate time. In some municipalities, citizens may make presentations to committees (e.g., transportation committee) but not to Council when it is making the decision.
- Some Council decisions are prompted by a municipal **department** that may have been looking at an issue for many reasons. For example, the department may be responding to an enquiry from a Councillor (often initially from a citizen), a department may of its own volition be seeking to take an action for which it needs Council approval, or the department is responding to an issue raised with them directly by a member of the public. It is always possible for you to contact administrative staff to ask for a meeting on a particular issue, or to request that a public meeting be held in the community.

  As a result of its deliberations in any of these situations, the department will ultimately be sending a report to Council with recommendations.
- Lobby, write and talk to your councillors. Remember to talk to all councillors, not just the ones that represent your area, because they all have a vote. Group action is often more effective than individual action, so if appropriate, try to involve other groups who may also be affected by the decision.

Administrative decisions, with right of appeal

Some decisions that might affect you as a community member are made by administrative staff. In situations where these decisions have a significant impact on the lives of particular citizens, the law provides for a system of appeal to a board made up of citizen volunteers, councillors or a combination of the two. For example, a Council can establish an Assessment Review Board which deals with complaints about taxes and tax assessments.

If you have an interest defined by the law, you will be notified of appeals before such boards. For example, if a development permit is granted which requires variances from the established requirements, nearby neighbours may be notified and given an opportunity to appeal to a Subdivision and Development Appeal Board.

There are also situations where a matter does not go before a municipal appeal board, but where the law allows a citizen to appeal a decision of Council to the Courts or to a provincial appeal board. For example, if an administrative decision is given to a community member to remedy unsightly property, there is a right to request Council to review the decision or, in limited circumstances, to challenge Council's decision in the Courts.

As a community member affected by a decision made by the administration, you can always contact your municipality to discuss a situation before a decision is made. Once a decision is made, you are bound by the strict procedures of appeal which you should be careful to follow. With regard to making appearances before appeal boards, see the tips under item 5, on page 9 of this guide.

Tip: Every municipality has to establish (or share with another municipality) a Subdivision and Development Appeal Board for the appeal of subdivision issues and development permits.

Administrative decisions, without right of appeal

Other decisions made by administrative staff do not have to be reviewed or passed by Council and are not subject to formal avenues of appeal. Such decisions might include whether a recreation program will continue or not, when street cleaning will take place in a particular area, or what traffic measures might be appropriate or not in a certain area. Following are some suggestions on how you can provide input to these decisions:

- Generally, the earlier you are involved in a decision process, the better chance you will have to influence the outcome. Don't expect to be formally notified.
- It is always possible to contact administrators (by e-mail, phone or in person) to discuss the decisions they are making. Even if a decision has been made, it might still be important to talk about the effects of the decision and request a review.

- If you think the decision affects a number of people, think about organizing a public meeting and asking civic staff to attend.
- If you are part of a community group or association, maintain ongoing links and good relations with municipal administrators. This can be time-consuming and is not easy for volunteer groups, but can pay dividends in the long run.
- Be aware of notices either in the press or mailed to your home which might be asking for input on a decision. Generally, municipalities want to make decisions that are good for most people and therefore public meetings will often be held to canvass certain issues.

Advisory boards

Sometimes municipalities will set up advisory boards relevant to particular areas or issues. The boards serve to advise Council and the administration, when requested, on matters such as heritage and historical issues, recreation issues or public services such as fire protection. Citizens are generally invited to apply to sit on the boards and it is usually possible for members of the public to make representations to an advisory board in regard to any particular issue either in writing or in person.

5. Tips on making meeting presentations

The following tips will help you to prepare:

Learn the date and time for the meeting. Contact the municipal office or visit the municipal website.

Learn clearly the issue at hand and understand the particular decision being made by the municipality or Council. If you are "on topic" and clearly address the issue at hand, your input will be much more valuable to those making the decision.

Register in advance to speak. Some municipalities have registration forms online, or you may contact the municipality by telephone. If you need presentation equipment (e.g., a computer, projector, etc.) request it at that time.

Find out what the meeting process will be. Your municipality may have policies about how meetings are organized (e.g. presentations by the public may be limited to five minutes). Also, try to observe a meeting before you attend your own to see how the forum works. Many board/committee/ Council meetings are open to the public, as are public meetings and hearings.

If providing any supporting materials, make sure you have enough copies for each board/committee/Council member. Call in advance to find out how many copies are needed. Note: Providing a summary of your speaking notes allows the listener to focus on you rather than taking notes.

Be prepared to make your point succinctly. You will be better received if you are ready and prepared. If you only have five minutes to speak, the time can go very quickly.

If presenting as part of a group, use your time wisely. Each group member should plan to present different points. Repetition of the same point(s) can irritate those hearing the issue.

Remain civil, no matter how deeply or passionately you feel about an issue. Members of the public can be asked to leave meetings if their conduct is improper.

If you cannot attend a meeting in person, you may write to the Council or committee members in advance of the meeting.